User Manual

DLS version 3 /
LibLime Academic Koha version 5.10

Latest update: August 26, 2015

11501 Huff Ct
North Bethesda, MD 20895

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Purpose

The Digital Library System (DLS) application is a feature-rich, scalable, web-based application used by organizations to place valued collections under intellectual control, while providing a means for the inventorying, cataloging, describing, indexing, searching, and requesting of any type of materials. The full DLS includes the digital object component; the ILS-only production is LibLime Academic Koha.

This DLS User Manual covers each module of the DLS application and offers step by step instructions for how to configure key features and provides instructions for feature use. The DLS User Manual is augmented by a database of online materials which are updated on a regular basis.

There are two interfaces to the DLS application, the staff client (for staff) and the Discovery Layer (for patrons). The main focus of this DLS User Manual document is the staff client, but Discovery Layer functions are covered as well.

1. Log in to DLS

When users first log into the DLS, the opening screen has information and menu options; these options vary based on the user's permissions. The user greeting page clearly shows which user is logged in and provides links only to areas the user is permitted to access. **NOTE: a user can log in either with the defined userid (OPAC Login field) or the cardnumber – if the value entered does not match the OPAC Login, it will try to match against a cardnumber.**

The first user greeting page, shown below, is for a user with full access to the entire DLS. This person can access any module of the DLS, including the full administrative suite. This user can also initiate a bibliographic search from this page via the Search Catalog option.

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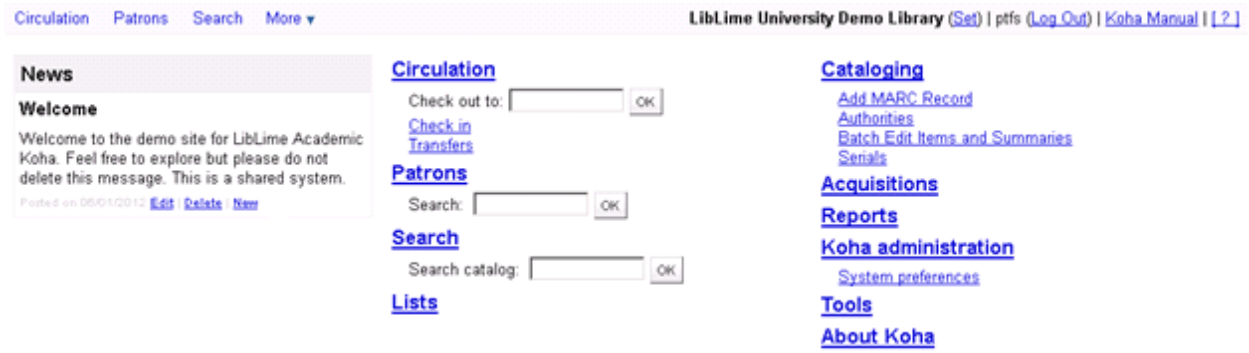
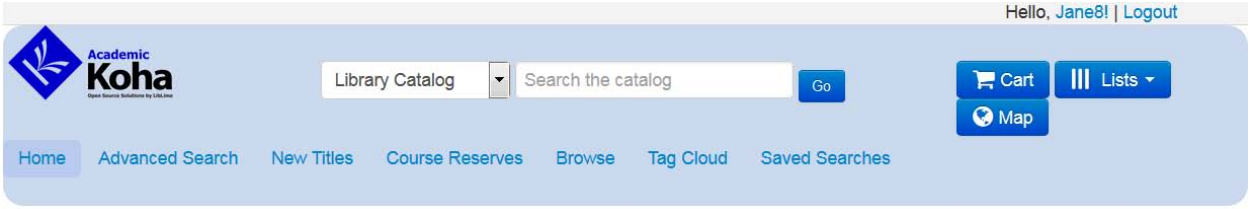
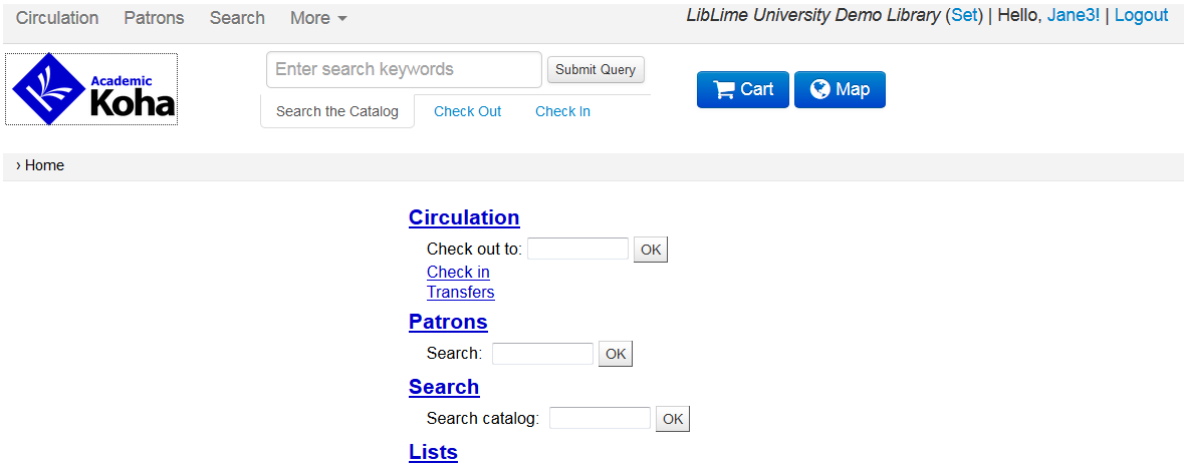


The second user greeting page, shows below, is for a user with limited access (basically OPAC only access) to the DLS. Note that no links to any staff functions are provided. This user can initiate a search against the database from the masthead search box which defaults to Library Catalog (keyword), or by going to the Advanced Search link.



The third user greeting page, shown below, is for a junior circulation librarian. This person has access to circulation, lists, and patron functions but no other areas (cataloging, reports, tools, administrative functions, etc.).



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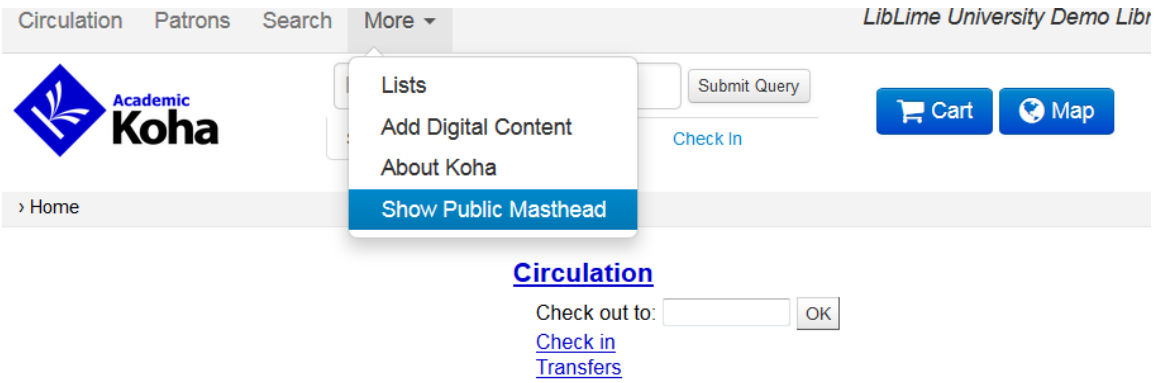
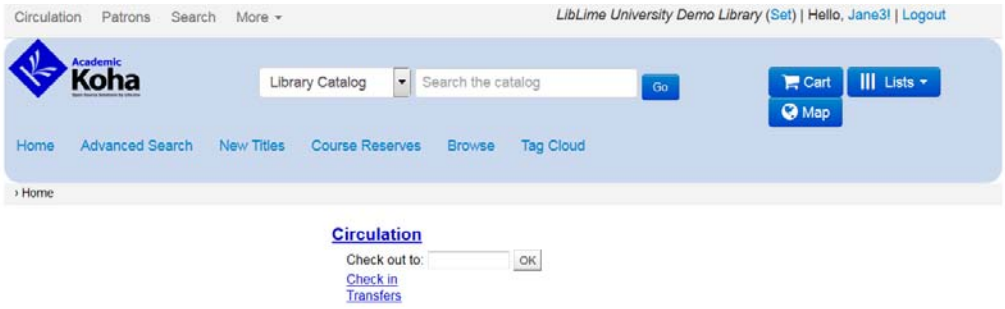
Again, note that for all users, the top menu bar is available throughout the staff client screens – the "More" menu has links to most of the functions listed on the main page. The staff masthead has tabs for searching the catalog and for starting a checkout (options vary depending on what screen you are on).

2.1 Toggle Between Staff/Public Masthead

Staff users can toggle between the staff and Discovery Layer masthead for more functionality as needed. Under More, click Show Public Masthead:



The top bar and main menu options remain the same, but the masthead changes to the public view:



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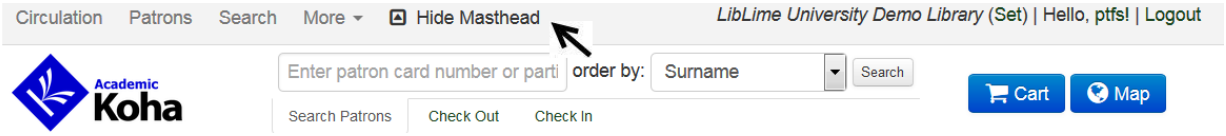
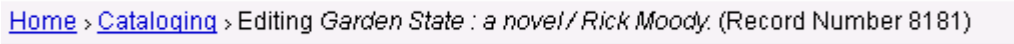
Click More, Show Staff Masthead to toggle back to the staff view. Staff can also minimize the staff masthead with the Hide Masthead toggle:



You can bring it back with the Show Masthead toggle:

2.2 Navigation

As you navigate through menus and submenus, you will see a breadcrumb line at the top of your screen. For example:



You can also navigate back one or more levels by clicking a link in the breadcrumbs. For example, in the second line above, clicking Circulation will take you back to the main Circulation menu page.

2.3 News Items

If you have permissions, (see the Creating a Staff Patron and Setting Granular Permissions section) you can create News items to display messages and notes for staff.

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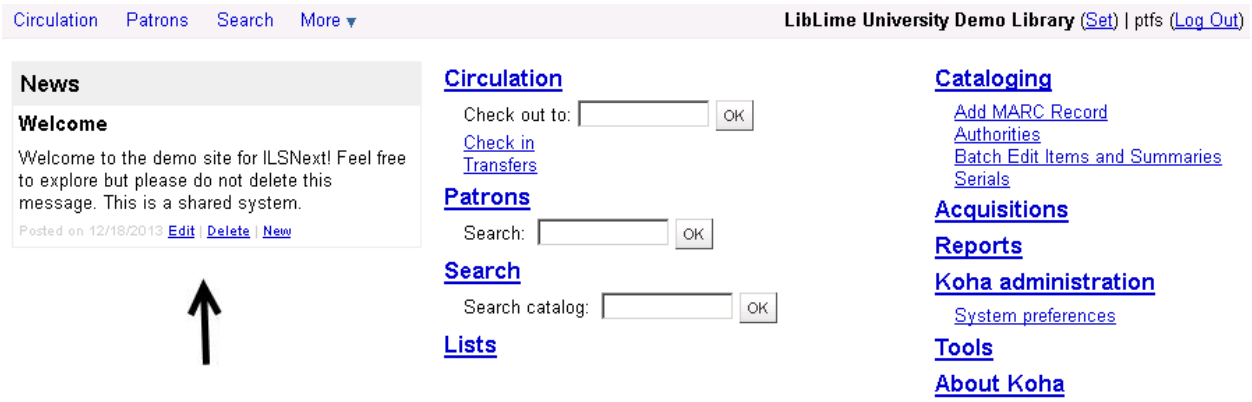
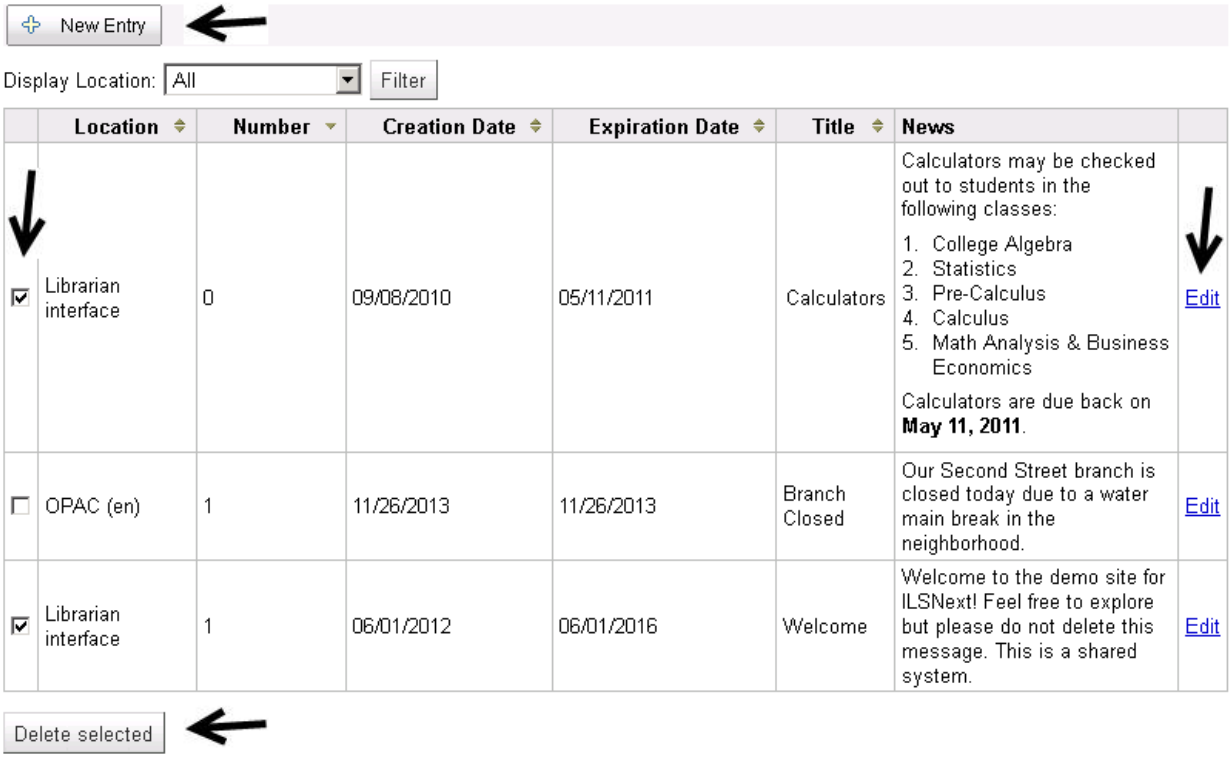


To access News items display messages and notes for staff, go to Tools, News. You can edit existing news items, delete items, or create a new one. To edit, click the 'Edit' link in the last column of the display. To delete, check the selection box and then click the 'Delete selected' button.



To create a new news item, click the New Entry button. First choose whether the item Display Location should display in Librarian interface (staff mode) or OPAC (Discovery Layer).

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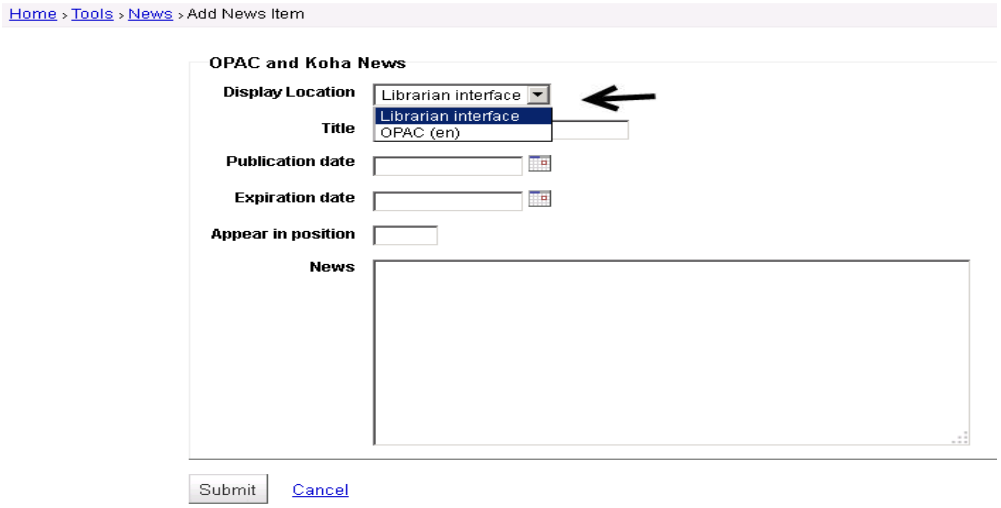
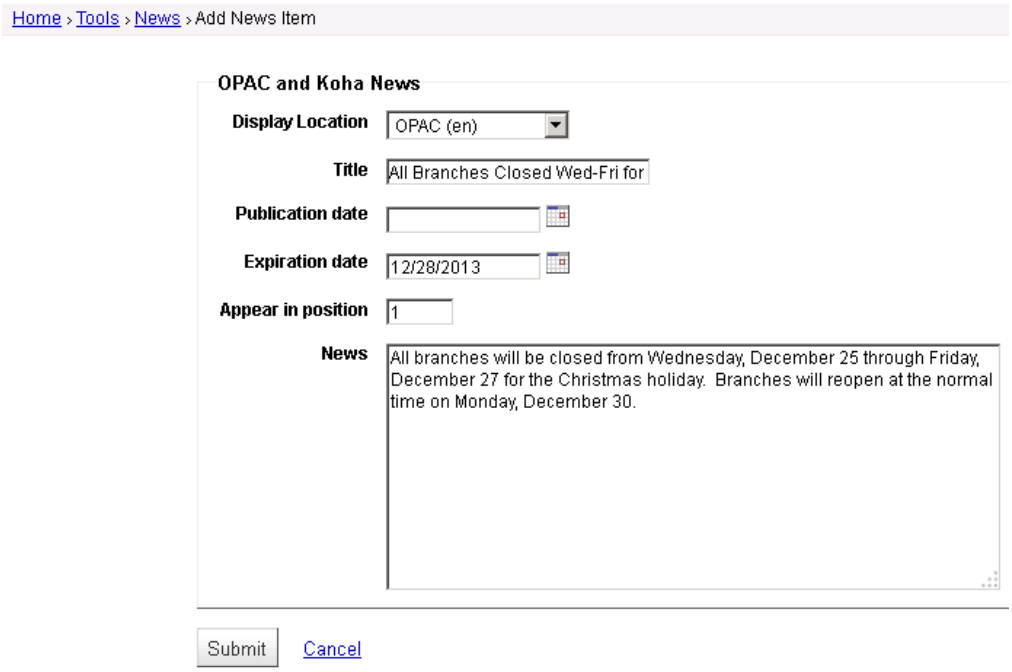


Then fill in the rest of the fields. Publication date will default to the date of creation. The system wants an expiration date, after which the item will no longer display. If you don't supply one at creation, it will default to the date of creation which means it will stop displaying the next day. Always give it an expiration date sometime in the future.

Position can be tricky – it's meant to determine the order in which items display, but if there is only one item you may have to try a couple of settings to get it to show. Usually position 1 is the best in that situation. The News field is the text for your message.


Home › Tools › News › Add News Item
OPAC and Koha News
Display Location
OPAC (en)
Title
All Branches Closed Wed-Fri for
Publication date
Expiration date
12/28/2013
Appear in position
1
News
All branches will be closed from Wednesday, December 25 through Friday, December 27 for the Christmas holiday. Branches will reopen at the normal time on Monday, December 30.
Submit
Cancel

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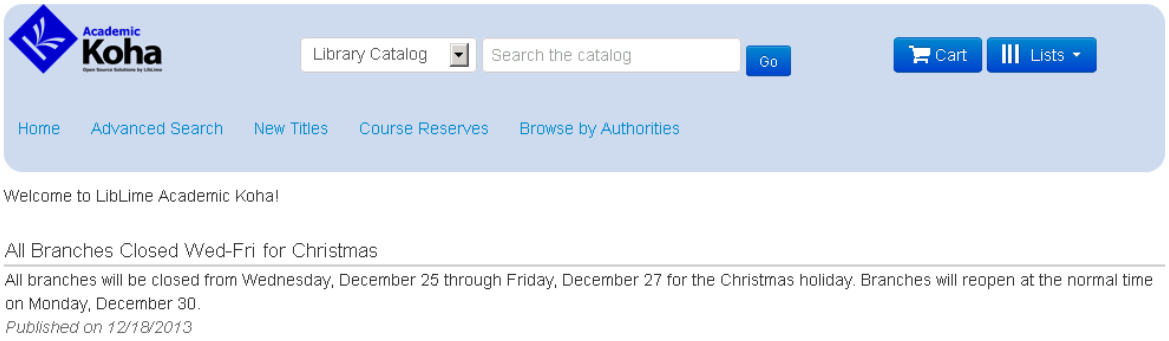
Click the Submit button to save your message, or Cancel to cancel it. To check staff messages, go to the staff client home page (first screenshot in this section). For OPAC messages, go to your Discovery Layer interface:


Academic Koha
Library Catalog
Search the catalog
Go
Cart
Lists
Home
Advanced Search
New Titles
Course Reserves
Browse by Authorities
Welcome to LibLime Academic Koha!
All Branches Closed Wed-Fri for Christmas
All branches will be closed from Wednesday, December 25 through Friday, December 27 for the Christmas holiday. Branches will reopen at the normal time on Monday, December 30.
Published on 12/18/2013

If you have any main page text configured for your Discovery Layer (such as the "Welcome" message above), it will display before the news items.

2. Searching

You can search for bibliographic records in a number of ways. The search areas offered will vary slightly in appearance and display, based on user permissions, but all searches are conducted in a similar manner.

3.1 Basic Search

DLS user with basic access can perform basic searches via the masthead. Search terms can be entered into the box provided. Searches can be narrowed using the drop down choices provided (the DLS defaults to a keyword search of the entire Library Catalog) by choosing one of the choices within the pulldown list:

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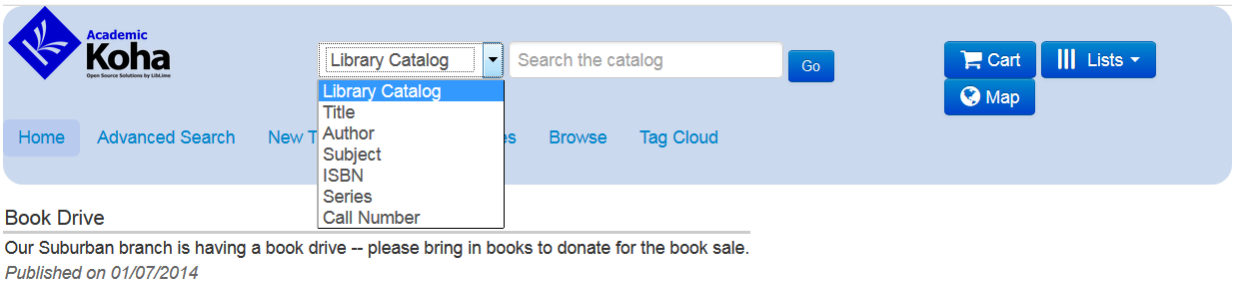
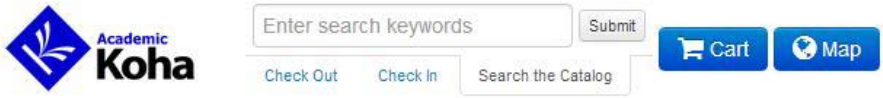


DLS users with staff permissions will see a persistent search bar atop each page of the DLS. This search bar includes a search box for search terms and three tabs, labeled Checkout, Check In, and Search the Catalog, respectively. The tabs available may change depending on what module is currently on screen.

As mentioned above, staff users can toggle between the staff search bar (masthead) and the public version. Each has different options.

In the Search the Catalog tab, users can enter search terms into the free text box. These search terms will be searched against the entire dataset (as a keyword search.)



3.2 Advanced Search

The DLS Advanced Search allows for more search options and increased precision within the search results set. Users can select multiple search options, such as Title and Author, and limiters as desired. Depending on system configuration, users may limit a search by:

- Library: (common in a multi-branch system)
- Item Type (book, manuscript, DVD, Video)
- Collection Type: (Fiction, Non Fiction, History, Reference)
- Shelving Location: (Upstairs, Downstairs, Basement, Storage)

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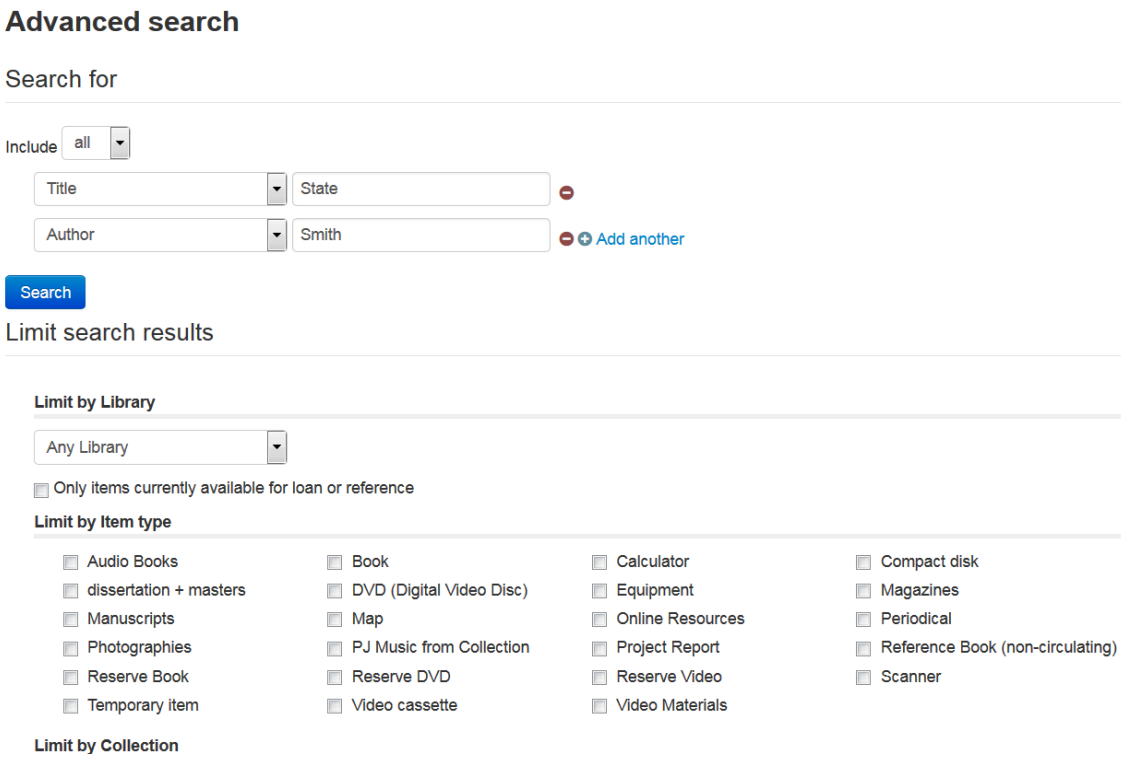
Other limiters are possible, and additional indexes can be added to the search box pulldowns if desired. See the Discovery Layer Customization Guide for setup information.



Two options (Limit by Loaded Date and Limit by Creation Date) allow searching against digital object file dates on full DLS systems. These also search bibliographic data (Creation Date comes from the 260$c and Loaded Date from the 260$g) so they can be used for non-DLS systems as well.

3.3 Truncation, Wildcard, and Direct Index Searching

See Appendix 2 of this manual or http://lucene.apache.org/core/2_9_4/queryparsersyntax.html for more details on searching; here are some tips.

For all searching (basic and advanced), stemming happens automatically (and is mutually exclusive with wildcard searching.

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For example:

- All searches will stem, but records that match the search term exactly will be ranked with higher relevance and be higher in search results. Further, stemming is based on dictionaries, so the words offered in a search result match are going to be related to the search terms; for example:
    - "test" will not match "tester", but it will match "tests" and "testing"
- Using an asterisk (*) will expand stemming and will remove the dictionary logic from the search
    - "test*" will match "test", "tests", "testing", "tester", "testitudinal".
- Adding a question mark (?) to the search term will return results with the search term plus one character, but no more than one character.
    - “test?" will match "tests" but not "test" or "tester"
- To use a wildcard to substitute for one character, put a question mark in the string:
    - “wom?n” will find woman or women
- Putting parentheses around terms will search the words in any order. To search an exact phrase, enclose it in double quotation marks:
    - “united states”
- You can also use an asterisk as an open-ended truncation symbol at the beginning, end, or both of a search term:
    - title:unite*

3.3.1 Other search tips

- What’s the syntax for single character right-hand truncation – nap or naps?
    - nap?
- What’s the syntax for multiple character right-hand truncation – nap or naps or napping?
    - nap*

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- What's the syntax for single character internal truncation – woman or women?
    - wom?n – single character truncation
- What's the syntax for multiple character internal truncation – woman or woken?
    - wo*n – multiple character truncation
- Is there syntax for left-hand, single or multiple truncation? – stub or tub – ecology or biology?
    - No left-hand truncation.
- What's the syntax for phrase searching?
    - Place the phrase in quotes, i.e.: "roman empire"

3.3.2 Index Searches

You can search against an index not configured in the pull-down, if you know the index name. For example, to do a manual title search (rather than using the pull-down), you could type title:(united AND states) in a search box. The "title:" portion is the index name. The search term follows; you can use Boolean operators such as AND, OR, NOT (in all caps). You can also combine indexes in a manual search: title:united AND author:smith. See the Appendix with Solr index names to identify a particular index.

3.3.3 Digital Object Searching

If your site is configured for the full DLS with associated digital objects, any search will automatically include searching against digital object metadata or full text of documents. Therefore, if you search for a string that might be in an attached .pdf file, the title record for the .pdf file will show in your search results. This may be confusing to users, since there is no immediately obvious reason for that title to be in the results list. Always check the title for associated digital objects and their content.

3.4 Search Results

After searching, if there are multiple records that match the search the user is given a search results set. If only one match is found, the user is brought directly to the matching record.

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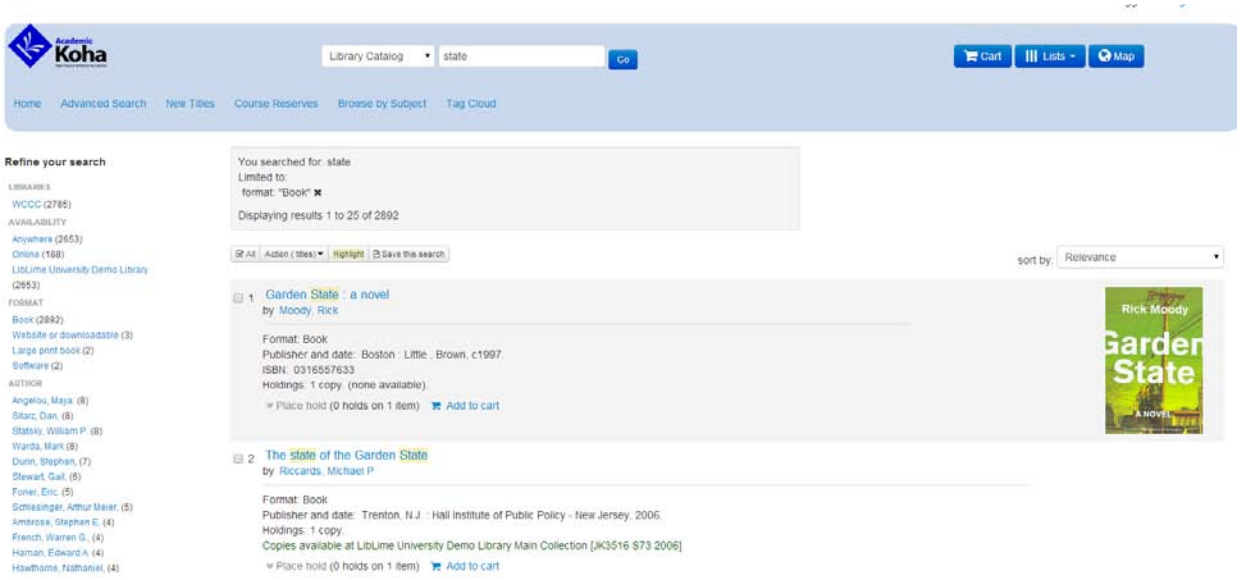
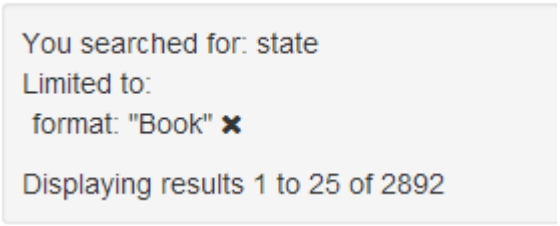


3.4.1 Statement of Search Terms

At the top of the results list, you'll see your search terms restated:



If a searcher wants to expand the search beyond the 2892 that were found in this example, remove the limit on item type of "Book" by clicking the X next to it; the search will be rerun and the result set would, logically, be larger.

3.4.2 Search Results

Beneath the statement of the search terms are the search results. By default, 20 search results will display per page; this can be adjusted in the administrative settings (the

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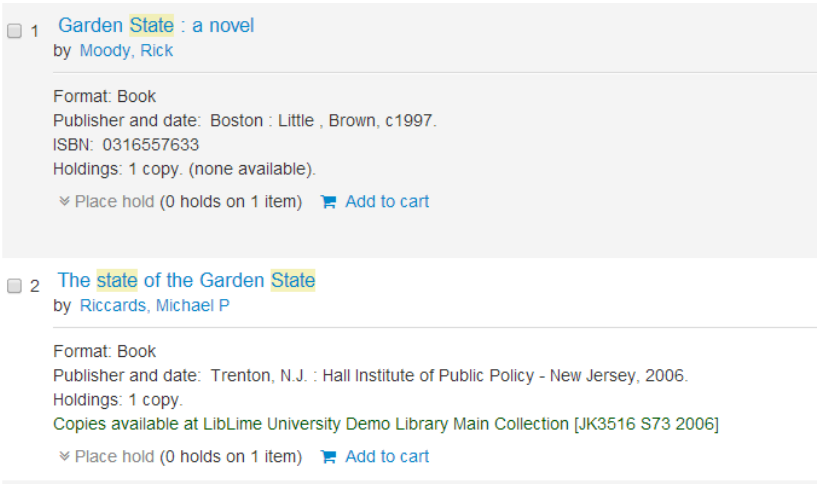
OPACnumSearchResults syspref) if desired. The standard results display shows key bibliographic and descriptive information as well as the current availability and location (call number) of items on the list.


1 Garden State : a novel
by Moody, Rick
Format: Book
Publisher and date: Boston : Little , Brown, c1997.
ISBN: 0316557633
Holdings: 1 copy. (none available).
Place hold (0 holds on 1 item) Add to cart
2 The state of the Garden State
by Riccards, Michael P
Format: Book
Publisher and date: Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.
Holdings: 1 copy.
Copies available at LibLime University Demo Library Main Collection [JK3516 S73 2006]
Place hold (0 holds on 1 item) Add to cart

The titles and item information show in the main part of the screen. The title and author are presented as hyperlinks.

- Clicking on the **title** will display the single title, with further descriptive details
- Clicking on the **author** will result in a new search being run, for all records with that author

From this page, a hold can be placed on a title by clicking on the hyperlink **Place hold**.

From this page, a title can be copied to a searcher's Cart by clicking on **Add to cart**.

3.4.3 Facets

To the left of the search results are search facets. These are drawn from various fields in the title and item record, and apply to the entire search results set. You can use them to filter down results to a smaller group. For example, clicking the Topic link for American Literature will limit the search to titles with that subject entry:

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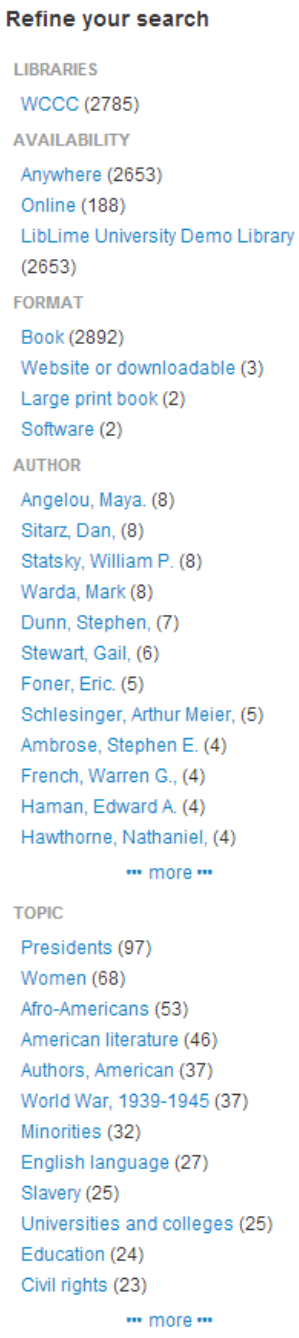

Facets are used to narrow further a search result set. Each facet offered is displayed as a hyperlink followed by a number, which indicates how many records in the search results set are linked to that facet. Clicking on a facet will re-run the search and return only items with that facet. For large sets of facets, clicking the More link will show more options:

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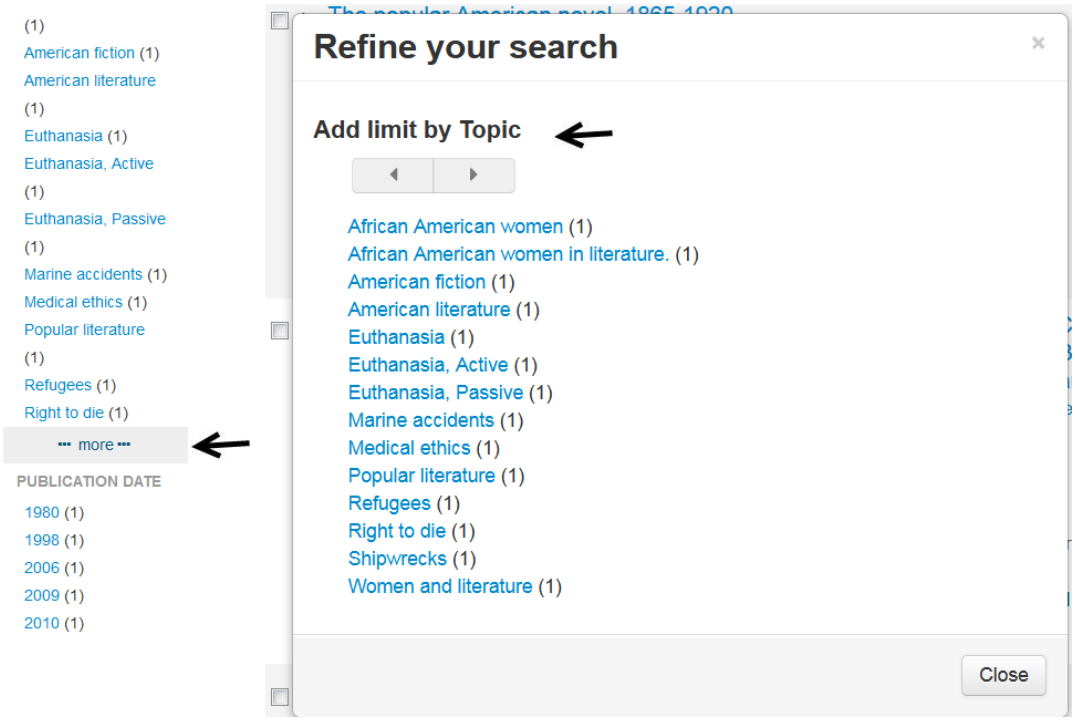

3.4.4 Sort Order and Relevance Ranking

The default sort order is relevance ranking, and that's the best option to use. The Solr search engine is configured to give more weight to records with the search term in specified fields (such as title, author, and subject). Entries with the search terms adjacent to each other will be ranked higher as well. You can also organize your results by author, title, call number, or date by changing the Relevance pulldown setting.

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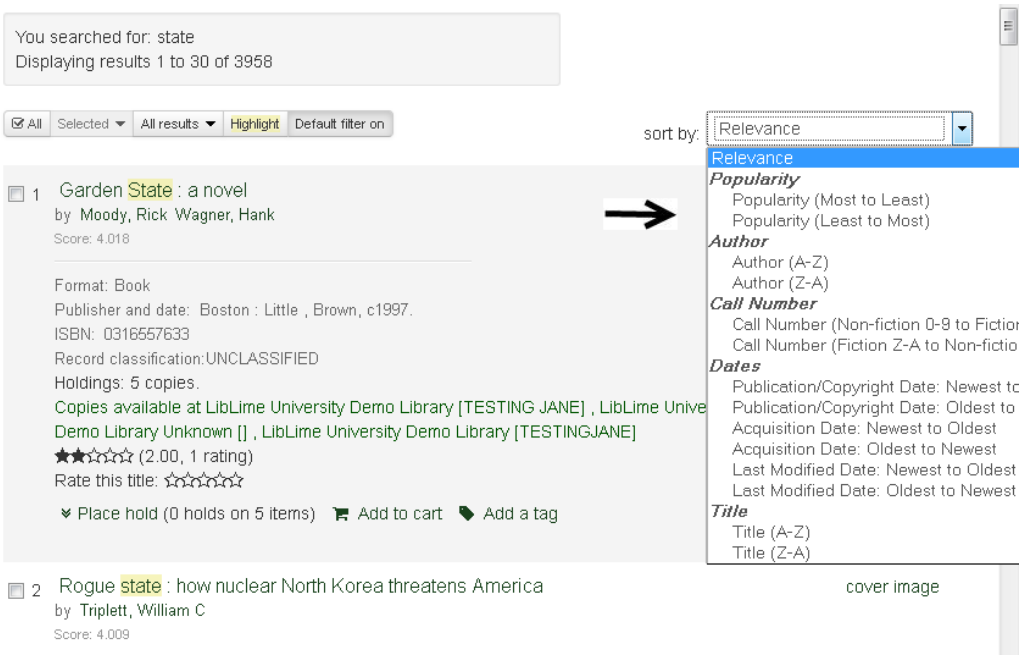
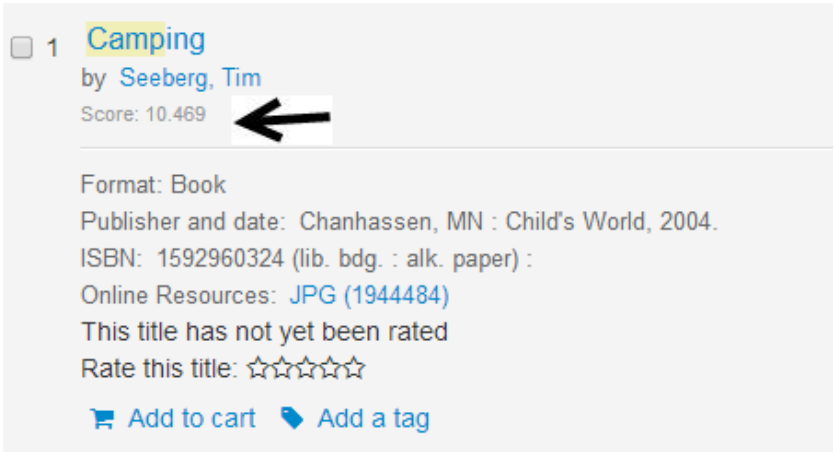


3.4.5 Solr Rank Display

Sites interested in showing the Solr ranking (the number used by Solr to determine display order in search results pages) can add that to the Discovery Layer search results page by placing the code below in the CSS Inline Styles section of the Discovery Layer editor (see the Discovery Layer customization guide for more information).

```
.search-result-score{
display:                                                    block;
}
```


1 Camping
by Seeberg, Tim
Score: 10.469
Format: Book
Publisher and date: Chanhassen, MN : Child's World, 2004.
ISBN: 1592960324 (lib. bdg. : alk. paper) :
Online Resources: JPG (1944484)
This title has not yet been rated
Rate this title:
Add to cart
Add a tag

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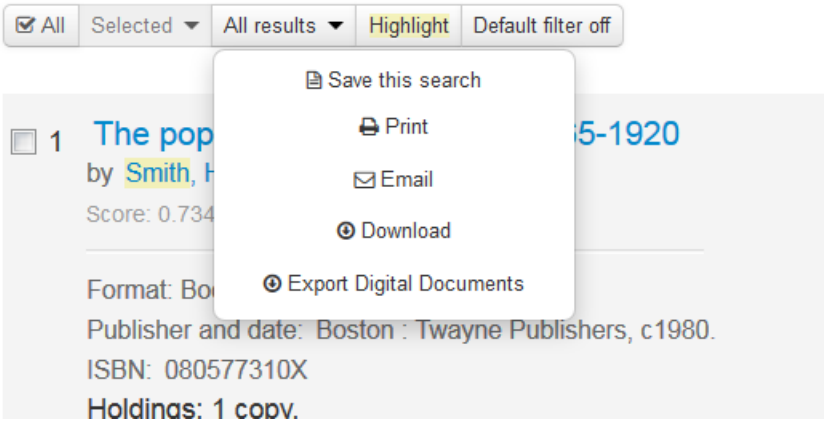
3.4.6 User Rankings

Users with the granular permission *catalogue: bib_ratings* will have the ability to rank a bibliographic record (on a scale of 1-5) by marking stars on the display. Users with the permission *catalogue: bib_ratings-view* will be able to view bib ratings but not create or modify them. *Users lacking these permissions will not see bib rankings at all.* These permissions can be assigned to patrons through Role records (see that section for details).

See the Discovery Layer section for details on how records are ranked and displayed.

3.5 Manage Search Results

All search results are available for emailing or saving, as the user desires. This is controlled via the option bar provided atop the search results. You must be logged in to email results.



Each item on the search results list has checkbox next to its main entry. These boxes can be checked individually.

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If the entire search results set is to be emailed or saved, users can click the option “All” from the option provided atop the search results list. Once items are selected (and there is a check mark in the box next to the main entry) they can be added to a list or cart under the Selected button:

All
Selected (2)
All results
Highlight
Default filter off
sort by:
Relevance
Add to cart
Add to List
Place hold
1
ovel, 1865-1920
Format: Book
Publisher and date: Boston : Twayne Publishers, c1980.
ISBN: 080577310X
Holdings: 1 copy.
Copies available at LibLime University Demo Library Main Collection [PS377.S57]
Place hold (0 holds on 1 item)
Add to cart
Add a tag
2
"Titanic" disaster : hearings before a subcommittee of the Committee on Commerce, United States Senate : Sixty-second Congress, second session, pursuant to S. Res. 283, directing the Committee to investigate the causes leading to the wreck of the White Star liner "Titanic."

Search terms within the search result set can also be highlighted for quick visibility. For example, if the Highlight button is selected, the search term is shown in a different-colored font in the search results set.

3.5.1 Saved Searches

If you are logged in, search results can be saved for future use. Click on “Save this Search” under the All Results button:

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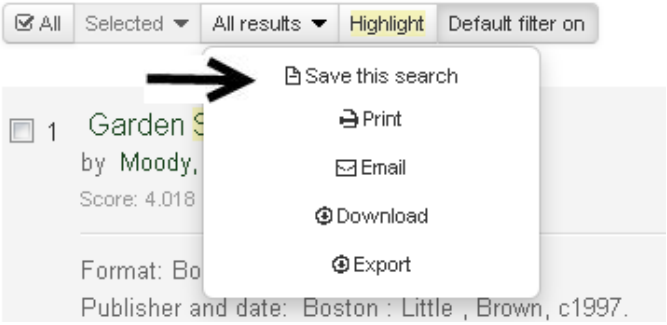
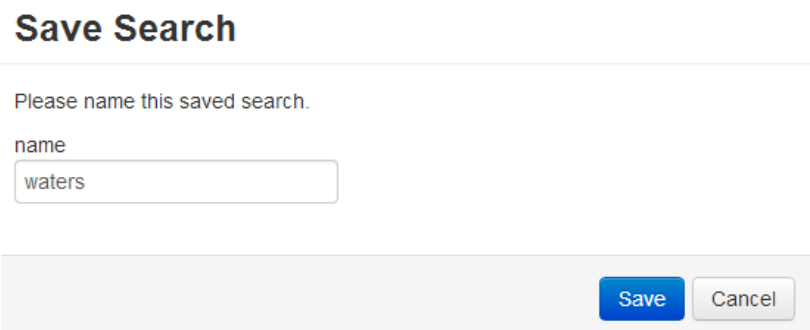
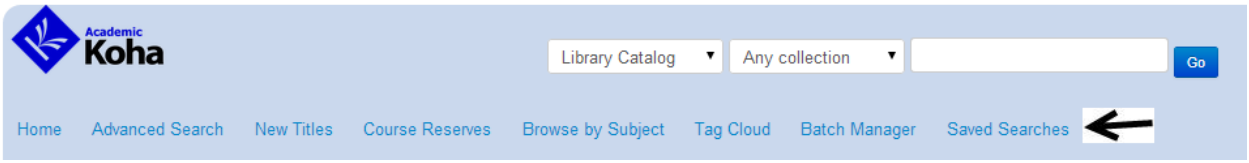


You will be prompted to name the saved search:



When a user has searches saved, and is logged in to the DLS, an option “Saved Searches” will display in the masthead.



Users with staff permission can see Saved Searches via the More option from the staff masthead:

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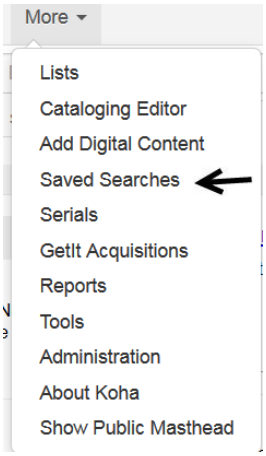
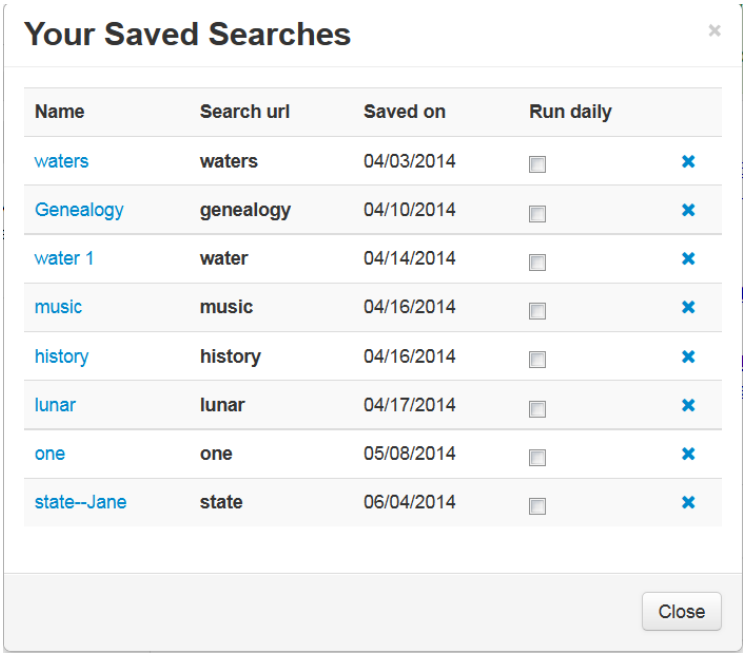


When the option is chosen, the list of searches saved is offered.



Clicking on the name of a saved search will run it. You can delete a saved search by clicking the X at the end of the line.

Note that you can opt to have the search run once a day (overnight with a cron job, if scheduled). If you enable the messaging preference *New results from scheduled search* the results of the updated search will be sent to you. See the section on messaging for more details on messaging preferences.

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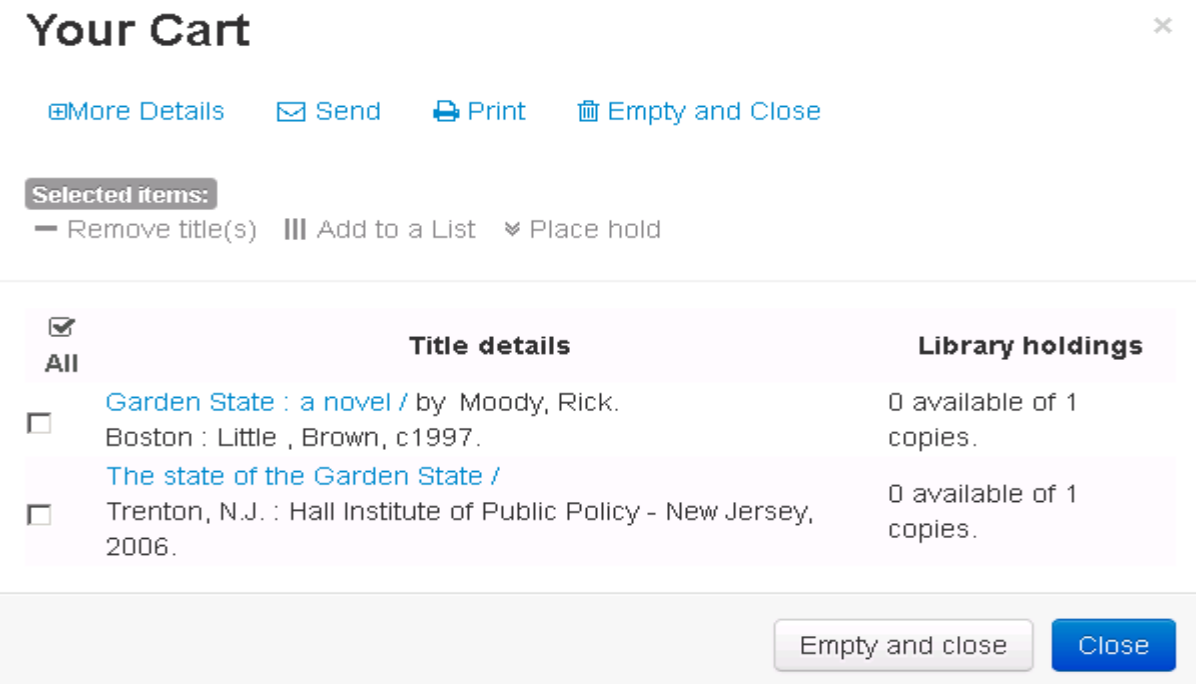
3.5.2 Cart

The cart is a holding place for a collection of records. You can add records either from the search results page or from an individual title display. When you have added items to the cart, the masthead display will change to show a count:

Clicking on the Cart button in the masthead will open a pop-up window with the contents of your cart.


Your Cart
More Details
Send
Print
Empty and Close
Selected items:
Remove title(s)
Add to a List
Place hold
All
Title details
Library holdings
Garden State : a novel / by Moody, Rick. Boston : Little , Brown, c1997.
0 available of 1 copies.
The state of the Garden State / Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.
0 available of 1 copies.
Empty and close
Close

You can email the group of records (MARC format), print them, add to a list, or place holds. The cart is not persistent – if you create a cart during one session, it will not remain in place the next time you log in. It's meant as a temporary holding bin for a collection of records during a catalog session. The cart display does not include item data, but the print or download output does:

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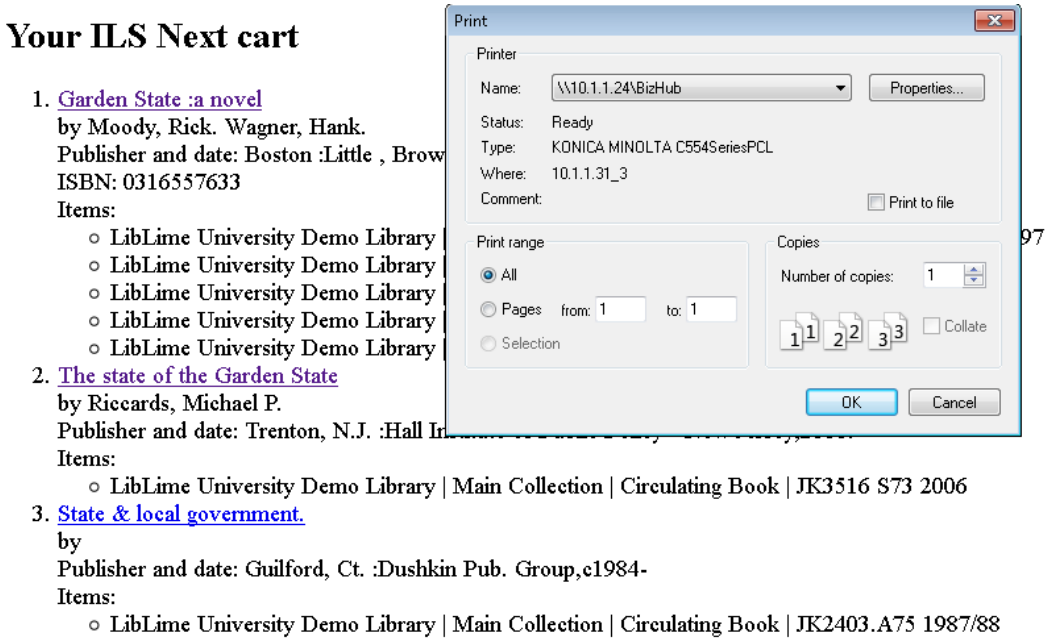
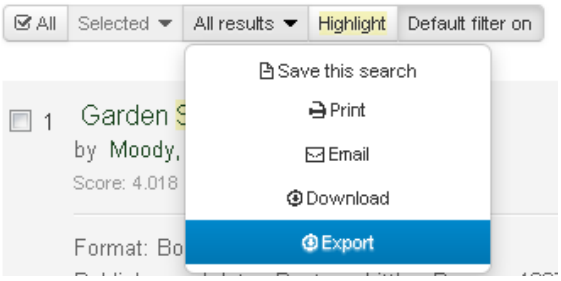


You can add items to the cart and print them without being logged in, but you must log into your account to be able to email them or add them to a list. In addition, your patron account record must have an email address for validation.

When you are finished with this group of records, you can empty the cart and close the window.

3.5.3 Downloading Full MARC or Digital Objects

Using the cart for downloading will produce a text output with limited fields (print/download output is controlled by the message template send_bib_batch). If for some reason you need a complete download of the full MARC record from a search results list, you can do so in XML format. From the search results screen, click All Results and select Export:



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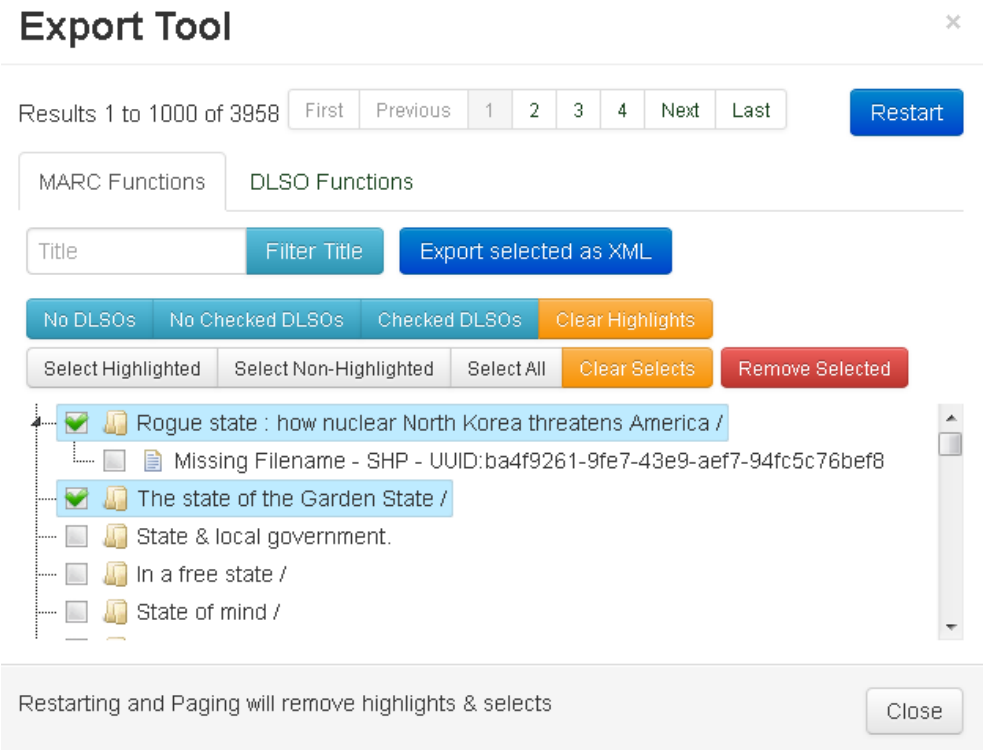
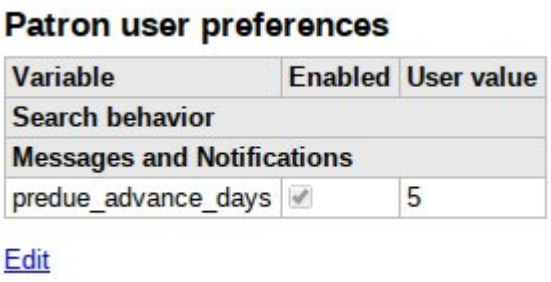
This brings up a tool which will allow you to select individual records from the results list. Pick the records you want and click Export Selected as XML:



On a full DLS system, this tool can be used to download the digital objects from a results list. Instead of clicking the title, you would click the digital object under a title entry – see the first title in the screenshot above. Then you would click the Checked DLSOs button to export.

3.5.4 Search Filters and User Preferences

Staff may configure default preferences in a Role patron or an individual patron record. From the main patron display page, click the Edit link under the Patron User Preferences section.



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There are several options in this area:

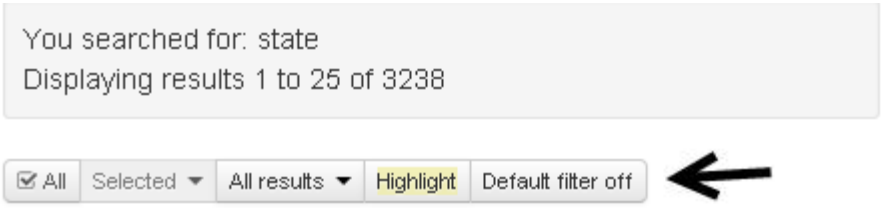
Variable	Enabled	User value	Description
Search behavior			
default_query_filter	☐		Must be a valid Solr fq filter.
use_default_filter	☐	☐	State of "Default Filter" in search results page
Messages and Notifications			
message_popup_duration	☐		Duration (s) of expiring DL pop-up alerts; 0 for indefinite
message_poll_interval	☐		Interval (s) between polling for pop-up and list messages
predue_advance_days	☑	5	Days in advance to receive notifications of items due; 0 for no advance notice

Submit Cancel

At the top, you could specify some Solr index defaults to be applied to searching. In most circumstances the defaults are fine. One use for the default filter would be to limit search results for the patron. For example, in a large multi-library system, you might want to limit searches to the patron's home branch by default. You could enter code like this:

owned-by:BRANCH1

(Use the appropriate branchcode.) In the Discovery Layer, the filter is applied automatically, but the patron can turn it off on a search results set by clicking the Default Filter Off button:



The search re-executes, and the button toggles to Default Filter On.

You must be familiar with the Solr index names and search syntax to set these up properly. Use these options with caution – invalid settings could disable searching altogether.

The Pop-Up Duration setting controls how long a pop-up message remains on the screen in the Discovery Layer. The default is 10 seconds; users can set that to any duration (in seconds) desired. Setting this to zero will make all pop-ups persist until the user actively closes them.
The Advance Days' Due Notice is the number of days in advance that Advance Notices should be sent. If the patron opts to receive Advance Notices, this is what controls the timing.

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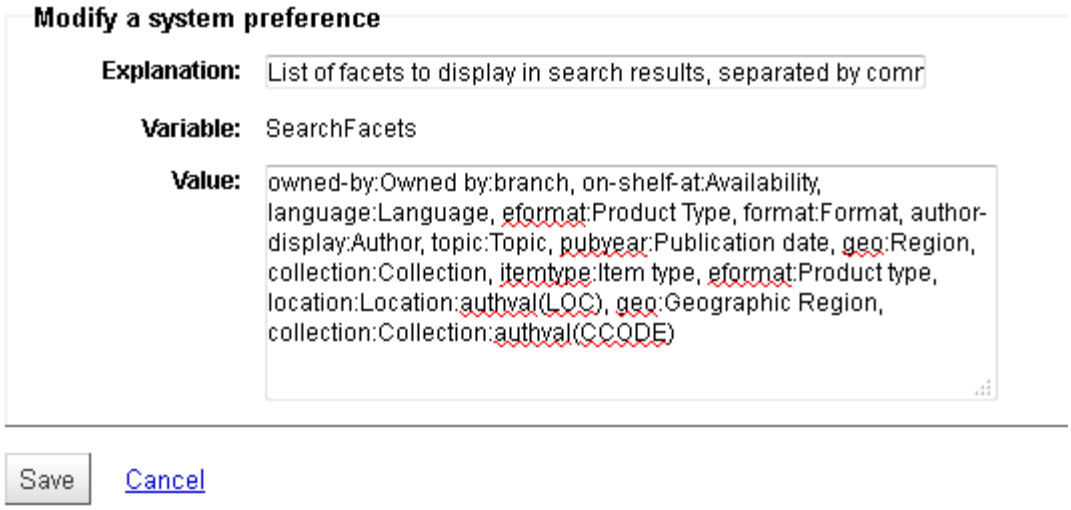
Patrons can also set these options in the Discovery Layer under the General Preferences tab; see that section for more details.

3.5.5 Control of Facets

The search results screen is configured with a default set of facets which users can use to limit results. Sites can control which facets appear (and in what order), and can add new ones as desired. Edit the system preference SearchFacets:



The syntax is the Solr index name (exactly as configured, including upper/lowercase) followed by a colon and the display name you want:

pubyear:Publication date

Entries are separated by commas. For fields which are controlled by authorized values, such as shelving location and collection code, you can add a third parameter with a colon after the display name – the word "authval" and name of the authorized value in parentheses:

location:Location:authval(LOC)

In this example, the shelving location is controlled by the authorized value LOC. Using this parameter means that the facets will show the display (e.g., Main Video Collection) rather than the actual code (VIDEO):

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To configure facets, the data point you want must have its own Solr index, and you must know the exact name of the index. (See the appendix on Solr index names for help.)

3.5.6 Multi-Language Searching

If you search against the index "text-fl" your term will be matched against a set of English synonym translations of various foreign languages. These terms are in a system file. For example, "text-fl:cheese" will match French records that contain the word "fromage" and Spanish ones that have "queso." French, Italian, Spanish, and German are presently supported.

3.5.7 Concept (Synonym) Searching

Similarly, you can search for certain terms and the system will look up possible synonyms. For example, searches for "concept:school" will match the word "school" as well as synonyms for school. The concept field contains all of the record's metadata text as well as the full-text content of the attached digital object if available.

3.5.8 Geospatial Map Display

Bibliographic records with key data in the 034 field (Coded Cartographic Mathematical Data) will display in a map if the GeoSpatial options are configured upon install. For example, the bibliographic record for the book “Geography” has coordinates in the 034 field; if users click the Map button to toggle map display, those coordinates show as a yellow dot and blue box on the map.

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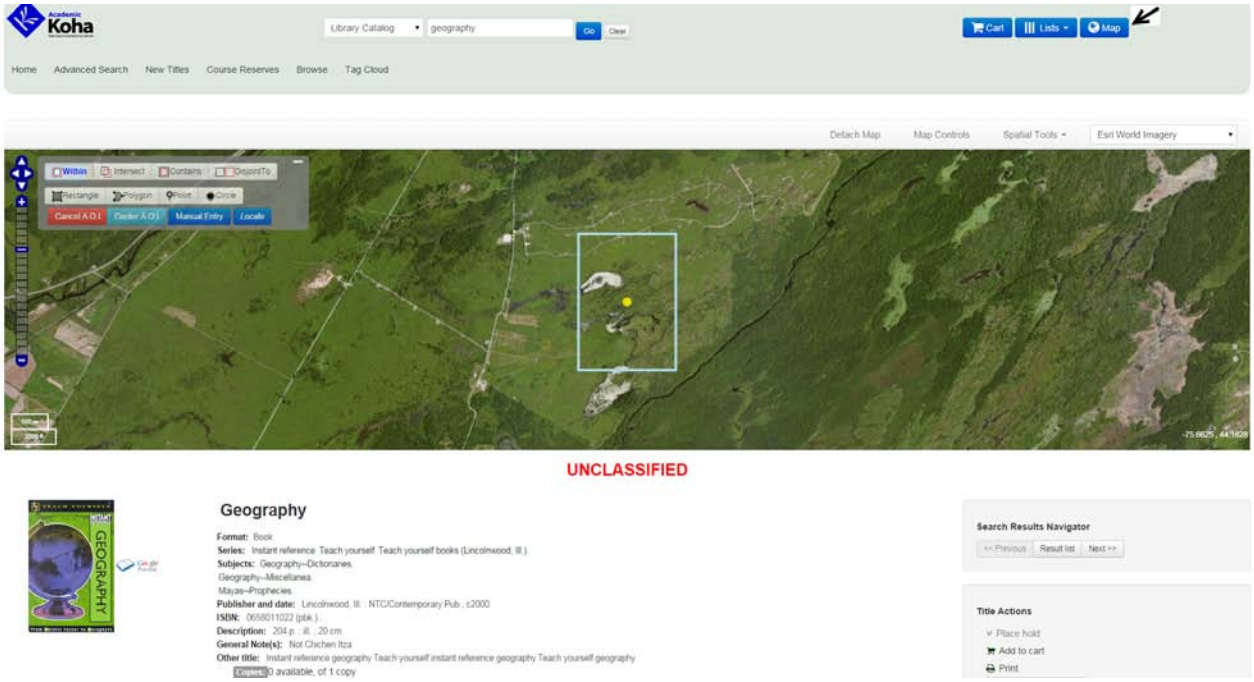

3.5.8.1 Map Display

1. By default, Esri World Imagery is used for the base map display. To change the base map, click the pull-down in the top right of the map and select another option, such as Google – Satellite.

2. Other menu items on the map menu bar are:

    a. **Detach Map** – This launches the map in a separate window allowing the map to be expanded to a larger size and allowing use of a second monitor when available. Close the window to revert back to a single window display.

    b. **Map Controls** –Turn controls on and off using the checkbox. Available controls are Grid display, Overview Map display, Disable Record Pan and Disable Record info. (Record Pan and Record info are enabled after query results are returned.)

    c. **Spatial Tools** – Allows searches using geospatial coordinates. Enter the geospatial coordinates and click Find. To change the type of coordinate system format used to search simply select the desired format from the coordinate list. Available coordinate system formats are DDD, DMS, UTM, MGRS.

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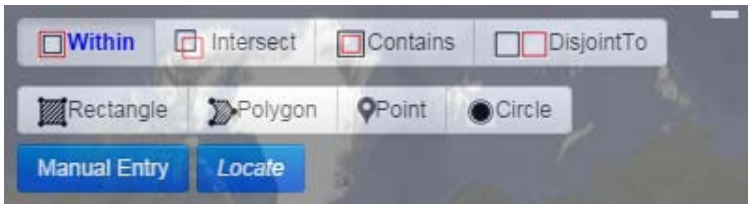
3.5.8.2 Performing a Graphical Search

The following operations make heavy use of the A.O.I. (Area of Interest) GUI control at the top left of the map. This control, used for graphical and manual geographical search and locate functions, comprises three rows of buttons. Each image has a geographic extent. The middle row defines the supported shapes for the A.O.I. and activates the drawing of the shape on the map. The top row describes the relationship of the image extent to the drawn A.O.I. The bottom row provides a button permitting the manual entry of the A.O.I. and another button to locate country/city/landmarks by name. Note that the entire GUI control can be minimized to an A.O.I. button to reveal the portion of the map obscured by the control. Simply click the "_" icon at the top right of the control.



1. When first accessing the map display, the A.O.I GUI control should be visible. The first step to creating the A.O.I is to select the type of A.O.I. The default setting is the **Within** Geospatial Search Method.

    a. **Within** means the A.O.I. is completely within the image extent

    b. **Intersects** means any part of the image extent touches the A.O.I.

    c. **Contains** means the image extent is completely contained within the A.O.I,

    d. **DisjointTo** means that the image extent is outside of the A.O.I.

2. After selecting a type of A.O.I. select the shape;

    a. **Rectangle** – To draw a rectangular shape, click on the map with the mouse, holding down the mouse button, drag your mouse until you have the desired A.O.I.

    b. **Polygon** – To draw a polygon, select Polygon from the A.O.I control, click on the map at your starting point, then click at other points until you have selected your area, double click on the last point to close the polygon.

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c. Point – Select **Point** from the A.O.I control, click a point on the map, a small red circle will appear marking the selected point.

d. Circle – To draw a circle, select **Circle** from the A.O.I control, click on the map and drag until you have the desired A.O.I.

e. **Manual Entry** – to create an A.O.I using coordinates, select the **Manual Entry** button, the A.O.I Manual Input dropdown window will appear which allows you to select either a rectangle or circle and the geospatial coordinate system to use. Enter your coordinates; click **Update** or **Update and Search.**

f. **Locate** – Locate will allow you to find an A.O.I by typing in an address or other location. Select the **Locate** button and enter an address or other location. A list of related locations will appear, select a location from the list. To search using that A.O.I click the **Search** button. To go to that location on the map, click **Pan To**. Or select **Close** to close the Locate screen.

3. To delete the A.O.I, click **Cancel A.O.I** on the A.O.I controls. To center the A.O.I on the map display, click **Center A.O.I.**

4. When an A.O.I is drawn on the map a search will be automatically initiated and the results will display as a list below the map and as "pins" on the map. Multiple results in close geographic proximity will display as a circle with the total number of results. To see individual records zoom in on the map.

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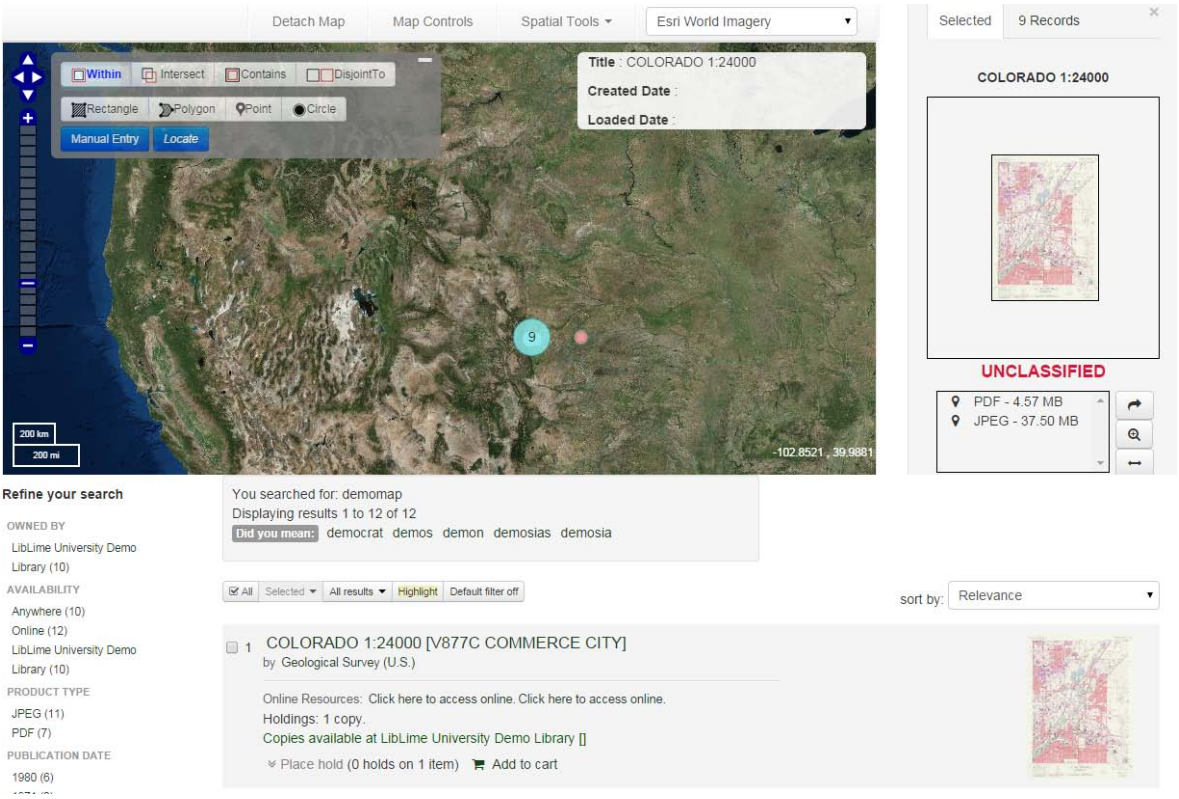

3.5.8.3 Viewing Records

1. To view record information from the map, hover over the pin and a small window will appear over the map displaying the title, created date and loaded date.

    a. To view the record in the record info panel to the left of the map, click on the pin (see image below).

    b. The record info panel shows the record title of the first document in the results list, a thumbnail of that document and shows a list of the digital documents that are attached to the record.

    c. Note that while the first record is shown in the window, a list of the other records in the list can be viewed by clicking on the tab above the thumbnail.

    d. Three icons are at the bottom right of the record info panel, select the first to go to the record on the map. Select the second to zoom to the extent on the map and select the third to toggle the extent on and off.

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2. To view the record and all related information and options, click on the record title in the results list. A new page will be displayed:

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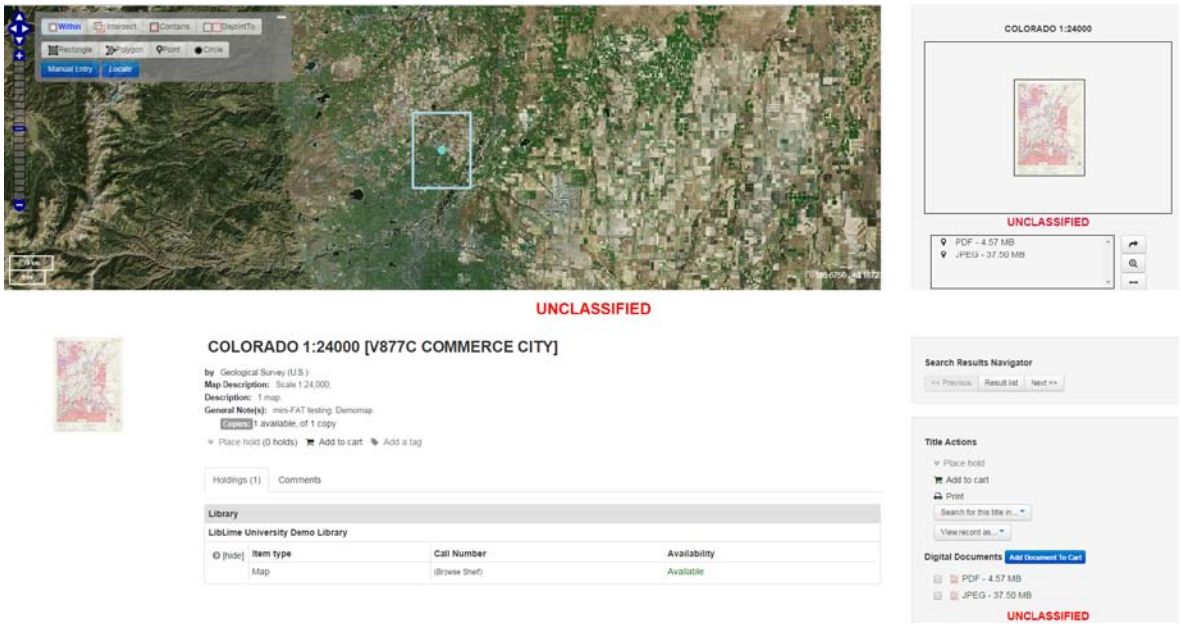

3.5.8.4 Digital Documents

1. To view the digital document, click on the document link under the **Digital Documents** header (bottom right panel). The **Document Viewer** window opens. An overview of the image is displayed with zoom/pan controls. The **Metadata** tab (default) provides the product format, type, and geospatial reference data.

    a. Clicking on the **Save/Print** tab displays number of print, save, save as, and delivery options.

    b. Under **Print Options**, the **Print Document** and **Print Metadata** buttons output the image overview graphic and the metadata text, respectively.

    c. Under the **Save Options**, four "Download" links are provided to save the specified data in its original format. **Download File**, **Download Metadata**, **Download Overview**, and **Download All** (zip file.

    d. Under the **Save As Options** the user can once again save the file alone or a package containing the file together with its metadata. However, here they can also convert the file format and choose the package container. (See below for instructions on chipping). Selecting **File Only** provides a pull down list of

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available conversion types. (Conversions available will vary dependent upon the original file type). The top entry shown in the **File Output Type** pull-down is the original file format, by default. Selecting **File & Metadata** displays two pull downs, **Package Type** (note**:** Bundle **is a .**zip file) and **File Conversion Type**. With all of default settings, click the **Save** button. A "zip" file containing the source file, a thumbnail, an overview, and the metadata is downloaded.

2. Clicking the **Detach** button in the upper right opens the document viewer in another window.

3. Click **Close** to close the Document Viewer window and return to the previous view.

3.5.8.5 Chipping

1. In the **Document Viewer window**, click the **Chip** tab. Note: only certain file types (NITF, GeoTIFF) support chipping. Unless the document selected supports chipping the **Chip** tab will not be visible.

2. Click in the drawing icon just below the map zoom/pan control. Draw the desired area (rectangle) to chip. Note that the longitude/latitude values are populated automatically. Also note that the format of these values can be converted using the **DDD**, **DMS**, **UTM**, and **MGRS** buttons.

3. The chip area can also be specified manually. Enter in appropriate long/lat values and click the **Update Map** button.

4. When one is satisfied with the chip area, specify a name for your chip file in the **Chip Output File Name** text-box.

5. Specify any desired file **Format** conversion using the pull-down selector. Click the **Run Chip** button. The chip will be created and made available for download.

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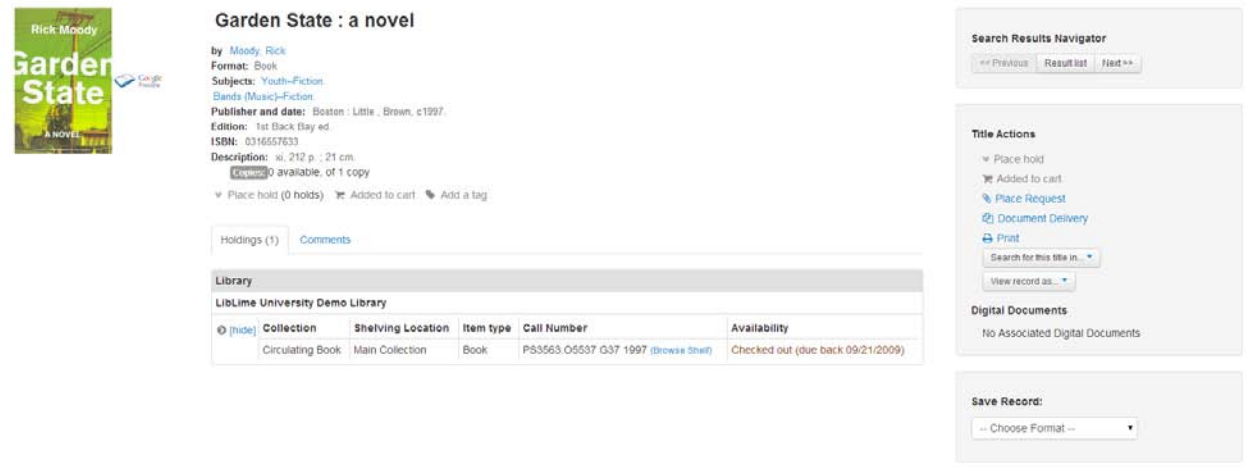
3.5.9 Other Discovery Layer Options

Other Discovery Layer options such as Lists, New Titles, and user account settings will be covered in a later section of this manual.

3.6 Discovery Layer View of Individual Bibliographic Record

Individual titles are displayed by clicking on the title link from the results page. In public (Discovery Layer) view, a DLS user with basic permissions will see a display like this:



Certain fields within the bibliographic record will show as hyperlinks. If you click on them, the system will do a new search against that term (such as author and subject headings).

Item data is shown beneath the bibliographic display. This data gives information about about shelving location and availability for loaning. Item records are usually associated with physical items; title records for online resources or digital objects may not have individual item entries.

If configured locally, an image of the item's dust jacket may display. Other content may be available on the screen or in tabs (reviews, extracts, etc.) if a site has subscribed to a service like Syndetics or Baker & Taylor.

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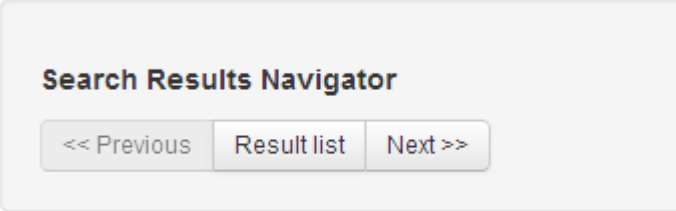
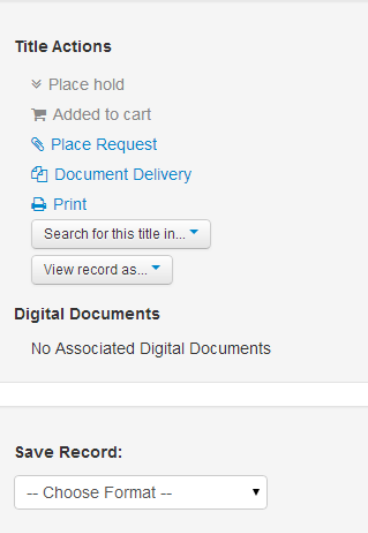
To the right hand side of the bibliographic display are additional options for navigating through the search result set and for acting further on the bibliographic record displayed. Users can also move back to the full result list or view the next/previous record in the list



Also displayed to the right of the bibliographic record are further features available related to the title. Each action is used by clicking on the description.



The available actions depend on your site's configuration. You may be able to place a hold, create a Call Slip (Request) or Document Delivery request, search for the title in external sites such as Google Scholar, and view any associated digital objects. If the Cart feature is enabled, you can add the title to your cart. You may also want to view the underlying MARC record. More information on most of those features is found elsewhere in the manual.

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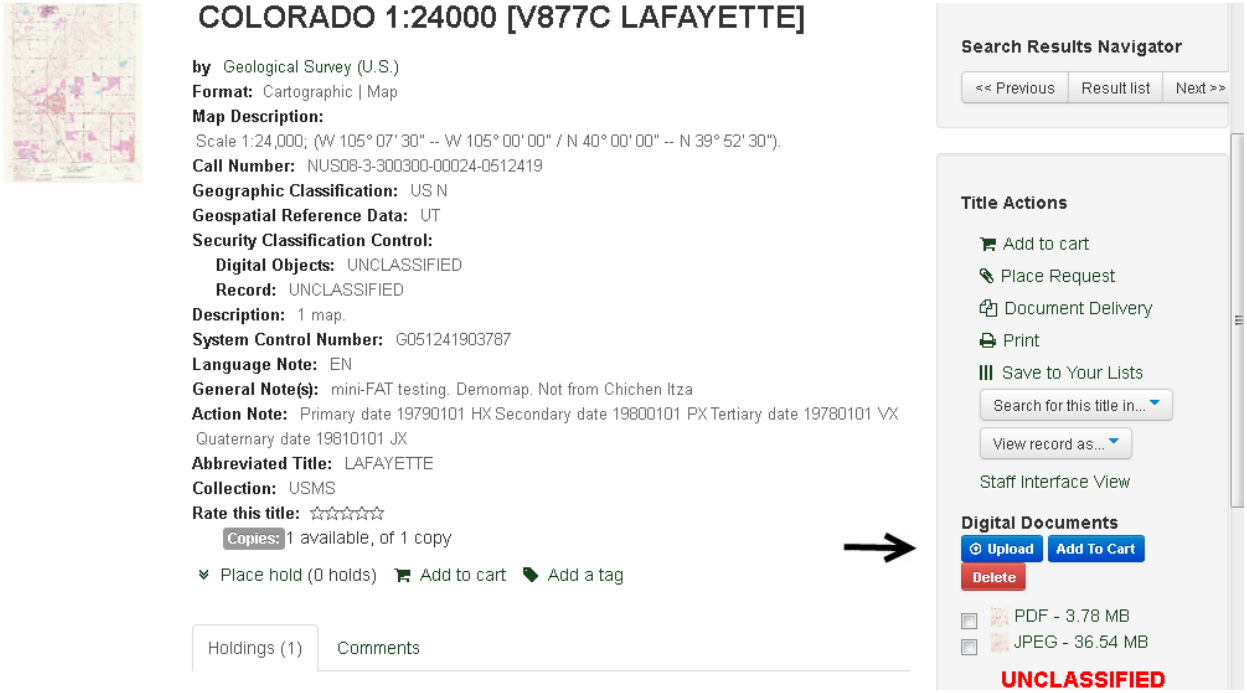
3.6.1 Viewing Digital Objects

If the site is configured for the full DLS (with digital object functionality), and the title has associated digital objects, links will show at the right-hand side with certain information (object type, size, etc.):



(If the user has the appropriate permission, a Delete link will also appear, allowing removal of the digital object.)

You can add any of the digital objects to your Cart by clicking the checkbox. Clicking on any of those links will open the digital object in a pop-up viewer window:

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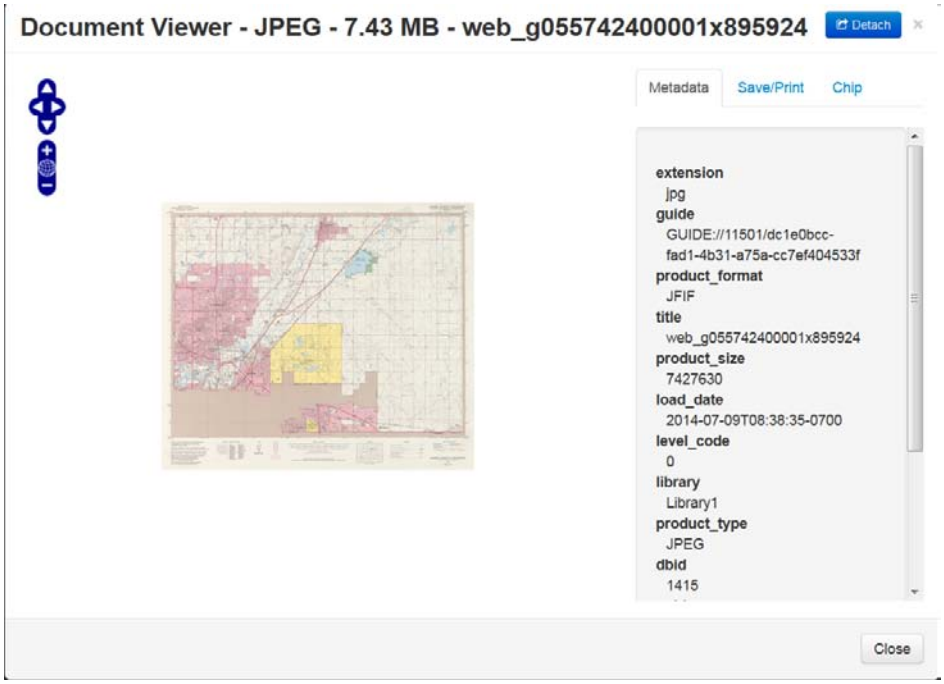
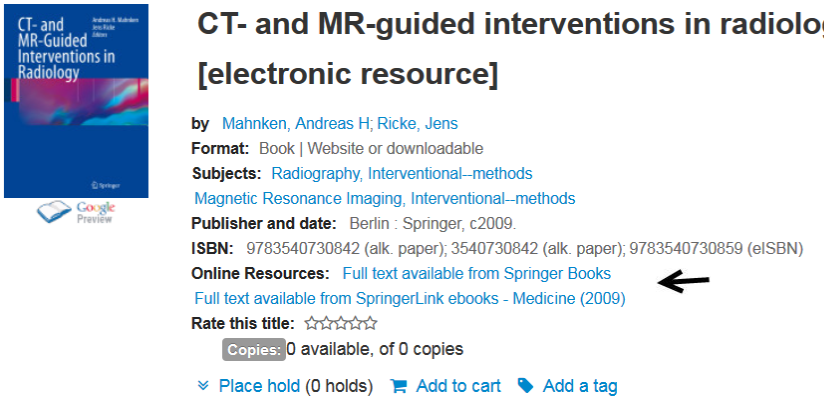


You will see the object along with certain information about it. Other tabs give you options for downloading or printing the object, or focusing in on particular geographic boundaries.

3.6.2 Other Online Resources

Titles with URLs in the 856 field that are not associated with digital objects will show those links in the search results and in the main title display.


CT- and MR-Guided Interventions in Radiology
Google Preview
CT- and MR-guided interventions in radiology [electronic resource]
by Mahnken, Andreas H; Ricke, Jens
Format: Book | Website or downloadable
Subjects: Radiography, Interventional--methods
Magnetic Resonance Imaging, Interventional--methods
Publisher and date: Berlin : Springer, c2009.
ISBN: 9783540730842 (alk. paper); 3540730842 (alk. paper); 9783540730859 (eISBN)
Online Resources: Full text available from Springer Books
Full text available from SpringerLink ebooks - Medicine (2009)
Rate this title:
Copies: 0 available, of 0 copies
Place hold (0 holds)
Add to cart
Add a tag

Users can click on the link text to go to the online resource.

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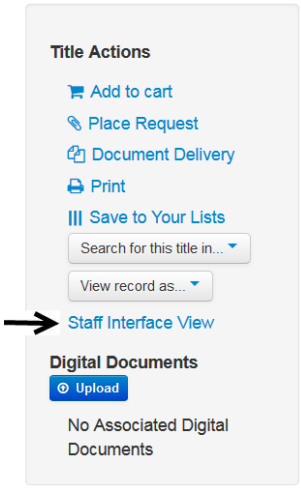
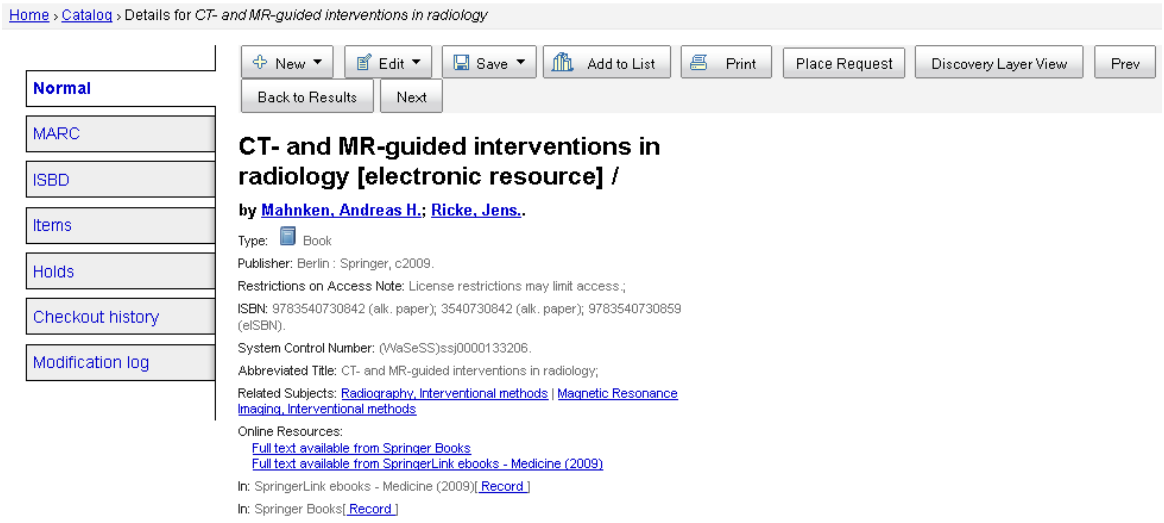
3.7 Staff View of Individual Bibliographic Record

Both public and staff users will see the Discovery Layer search results and title display. However, if you're logged in as an account with staff permissions, you will see an additional link on the title display to switch into staff view:



Clicking that link takes you into the staff interface, where you will have options for editing the record, managing holds, viewing the checkout history, and more:


Home › Catalog › Details for CT- and MR-guided interventions in radiology
Normal
MARC
ISBD
Items
Holds
Checkout history
Modification log
New
Edit
Save
Add to List
Print
Place Request
Discovery Layer View
Prev
Back to Results
Next
CT- and MR-guided interventions in radiology [electronic resource] /
by Mahnken, Andreas H.; Ricke, Jens..
Type: Book
Publisher: Berlin : Springer, c2009.
Restrictions on Access Note: License restrictions may limit access.;
ISBN: 9783540730842 (alk. paper); 3540730842 (alk. paper); 9783540730859 (eISBN).
System Control Number: (WaSeSS)ssj0000133206.
Abbreviated Title: CT- and MR-guided interventions in radiology;
Related Subjects: Radiography, Interventional methods | Magnetic Resonance Imaging, Interventional methods
Online Resources:
Full text available from Springer Books
Full text available from SpringerLink ebooks - Medicine (2009)
In: SpringerLink ebooks - Medicine (2009)[Record]
In: Springer Books[Record]

Buttons for Prev, Next, and Back to Results will let you move between title displays without having to return to the results list.

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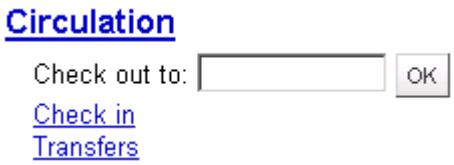
What you can do at this screen depends on the permissions assigned to your staff login account. For more information about working with bibliographic records, see the section on creating and editing records later in this manual.

3. Circulation and Material Management

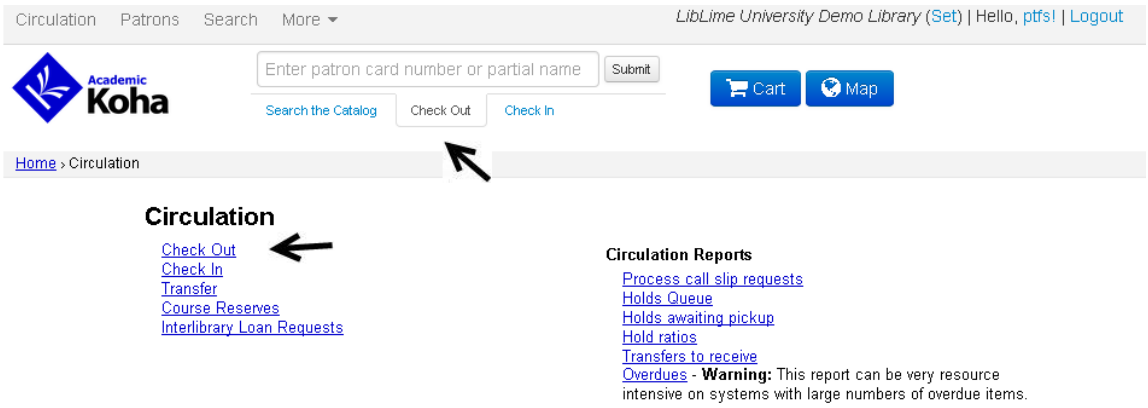
4.1 Checking Out

The most frequent circulation activity is checking materials out to a user. In a standard library scenario, a patron will bring an item to the circulation desk. It's assumed that library staff have the item in hand but will need to look up the patron record. Therefore, a patron search is the first step in a checkout.

A checkout can be started from many places in the staff client. On the home landing screen, a search box allows staff to search for a patron record:



Searches can also be done from the main Circulation menu, or by clicking the Check Out tab at the top of most staff client screens:



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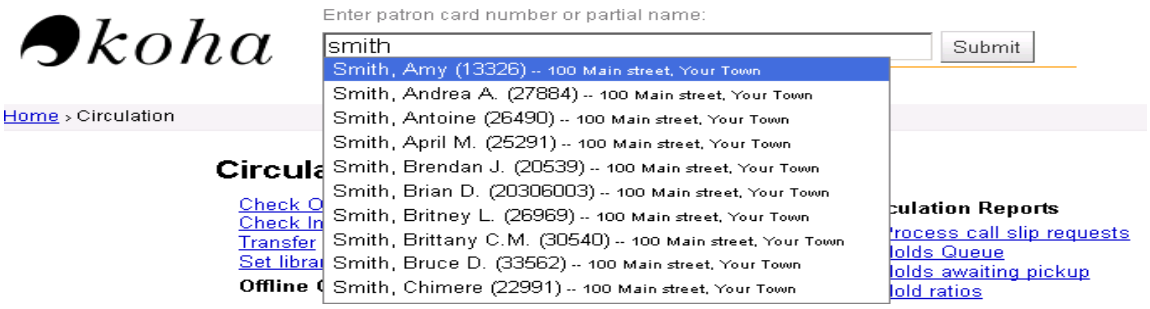
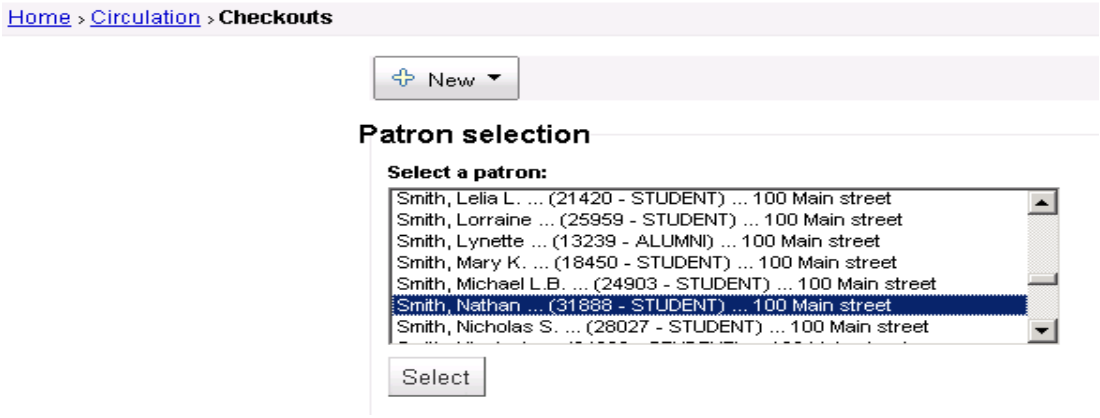
Scan or enter a name, partial name, or patron cardnumber (barcode) in the search box and click Submit. You can truncate the search using an asterisk (*) – for example, Smit* to find all names beginning with that string, or *smith to find all names ending with that string.

If the CircAutocompl syspref is turned on, the system will show possible matches and you can select one:


koha
Enter patron card number or partial name:
smith
Submit
Smith, Amy (13326) -- 100 Main street, Your Town
Smith, Andrea A. (27884) -- 100 Main street, Your Town
Smith, Antoine (26490) -- 100 Main street, Your Town
Smith, April M. (25291) -- 100 Main street, Your Town
Smith, Brendan J. (20539) -- 100 Main street, Your Town
Smith, Brian D. (20306003) -- 100 Main street, Your Town
Smith, Britney L. (26969) -- 100 Main street, Your Town
Smith, Brittany C.M. (30540) -- 100 Main street, Your Town
Smith, Bruce D. (33562) -- 100 Main street, Your Town
Smith, Chimere (22991) -- 100 Main street, Your Town
Home › Circulation
Circula
Check O
Check In
Transfer
Set libra
Offline
culation Reports
Process call slip requests
Holds Queue
Holds awaiting pickup
Hold ratios

If that syspref is not turned on, or you don't see the desired user, just click Submit. If there is only one match you'll be taken directly into the patron record. If there are multiple matches, you'll get a pull-down list of patron records:


Home › Circulation › Checkouts
New
Patron selection
Select a patron:
Smith, Lelia L. ... (21420 - STUDENT) ... 100 Main street
Smith, Lorraine ... (25959 - STUDENT) ... 100 Main street
Smith, Lynette ... (13239 - ALUMNI) ... 100 Main street
Smith, Mary K. ... (18450 - STUDENT) ... 100 Main street
Smith, Michael L.B. ... (24903 - STUDENT) ... 100 Main street
Smith, Nathan ... (31888 - STUDENT) ... 100 Main street
Smith, Nicholas S. ... (28027 - STUDENT) ... 100 Main street
Select

Find the right patron and click Select, and you'll be taken into the patron record, on the Checkout tab. Enter or scan the item's barcode into the Checkout box:

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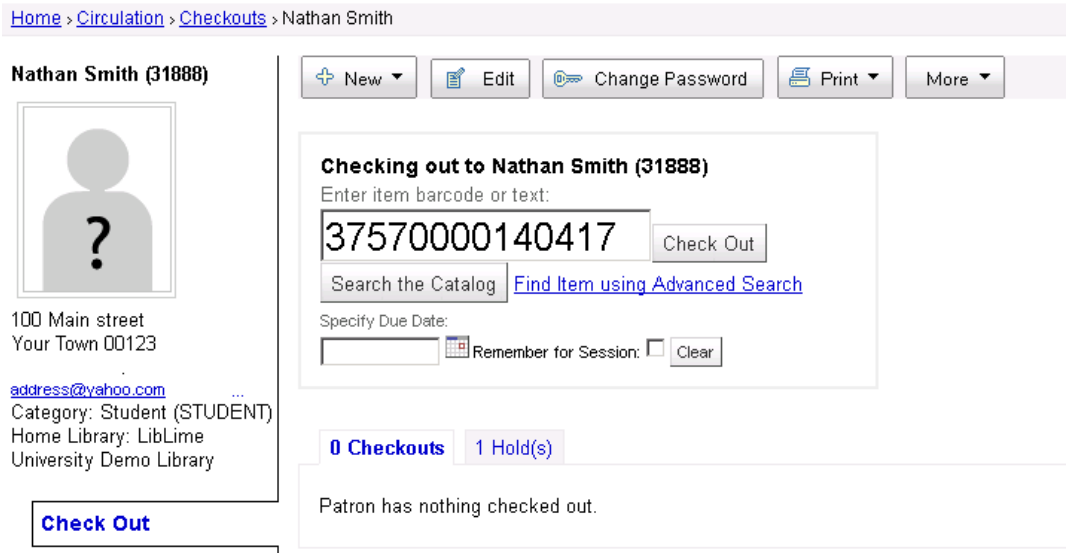
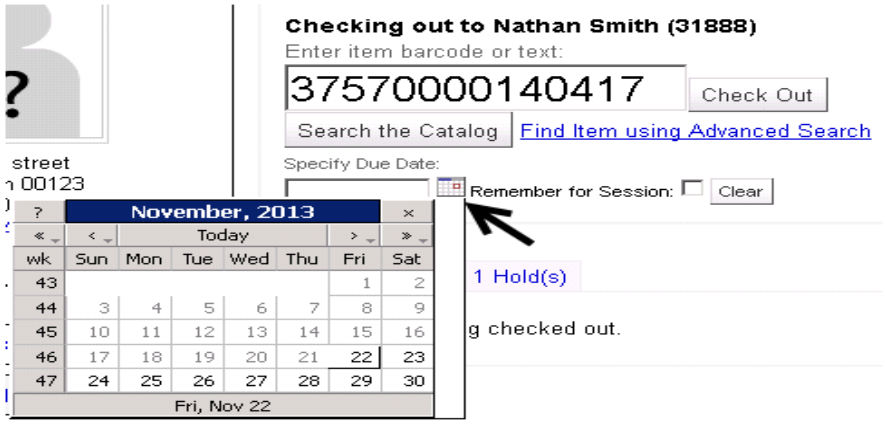


For most checkouts, you will want the checkout period specified in the circulation rule to automatically take effect. However, at times you may want to check the item out for a shorter or longer period of time. If the option is turned on for staff (with the SpecifyDueDate syspref), you can use the calendar gadget to pick a due date:


Checking out to Nathan Smith (31888)
Enter item barcode or text:
37570000140417
Check Out
Search the Catalog
Find Item using Advanced Search
Specify Due Date:
Remember for Session:
Clear
1 Hold(s)
November, 2013
Today
wk Sun Mon Tue Wed Thu Fri Sat
43 1 2
44 3 4 5 6 7 8 9
45 10 11 12 13 14 15 16
46 17 18 19 20 21 22 23
47 24 25 26 27 28 29 30
Fri, Nov 22

The Remember for Session checkbox will retain the alternate due date you pick for all checkouts until you log out of the DLS. Be careful using that setting; it may not be obvious on the next patron's checkout. If you use it, click the Clear button before doing the next checkout.

The Search the Catalog button and the Find Item using Advanced Search link can be useful if you have the patron record but not the exact item record, but that is relatively rare. In that case, you can search the catalog, find and copy the barcode, and come back to this screen to do the checkout. Enter your search text in the checkout box and click Search the Catalog, or go to the Advanced Search link.

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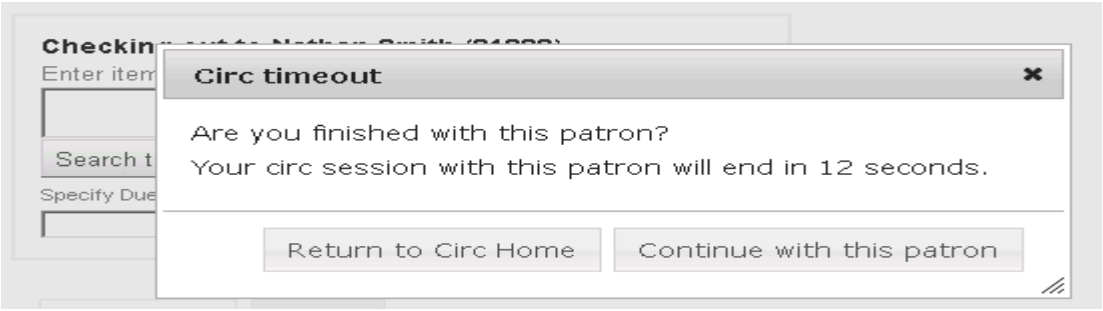
When you've entered all needed data, click the Check Out button to complete the transaction. The item is marked as checked out, and the system remains on that screen so that another item could be processed.

You can continue checking items out to that user, use the Checkout tab at the top of the screen to search for another patron record, or use one of the menus or breadcrumb links to navigate somewhere else in the staff client.

If the syspref CheckoutTimeout has a value, the system will pop up a warning after the specified inactivity period:


Circ timeout
Are you finished with this patron?
Your circ session with this patron will end in 12 seconds.
Return to Circ Home
Continue with this patron

If you do nothing, the timeout will eventually return the screen to the Circulation menu. Click the Continue with this patron button to remain on the patron screen. This is a privacy feature for environments where the staff screen might be visible to users.

4.2 Checkout Messages, Warnings, and Blocks

Before you take any action, look at the Patron Checkout screen. It may display various messages, ranging from a simple alert about a waiting hold

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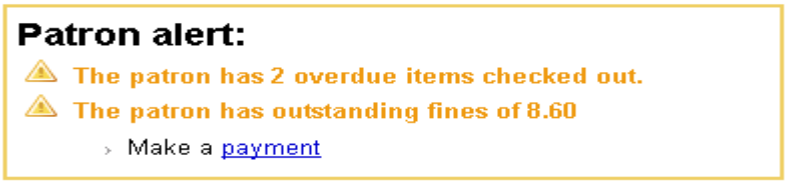
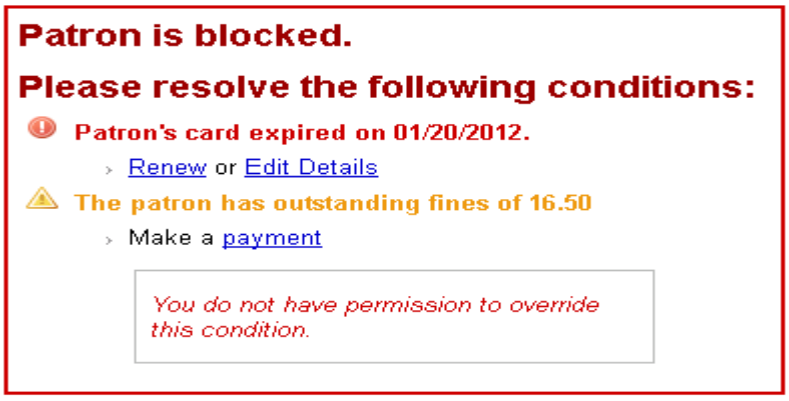
Holds waiting:
Threshold of war : (Book), by Heinrichs, Waldo H. Hold placed on 11/21/2013.
Waiting at LibLime University Demo Library

to warnings about overdue items and fines



to a block on checking out for various reasons. In the example below, there are two problems. The first is that the patron's card has expired – a Renew link allows the staff person to quickly renew the card. The second problem is outstanding fines over the amount specified by the "Circ block fine threshold" setting in the patron category policy or in other system configuration settings. In this example, the staff person can accept a payment but does not have permission to override that block and continue with a checkout. Either the patron must make a payment, or a more senior staff person with override permissions would have to log in and process the checkout.


Patron is blocked.
Please resolve the following conditions:
Patron's card expired on 01/20/2012.
Renew or Edit Details
The patron has outstanding fines of 16.50
Make a payment
You do not have permission to override this condition.

A patron's record may be marked as debarred, either manually (by editing the record) or automatically by an overdue notice. In that case, the checkout screen message would reflect that:

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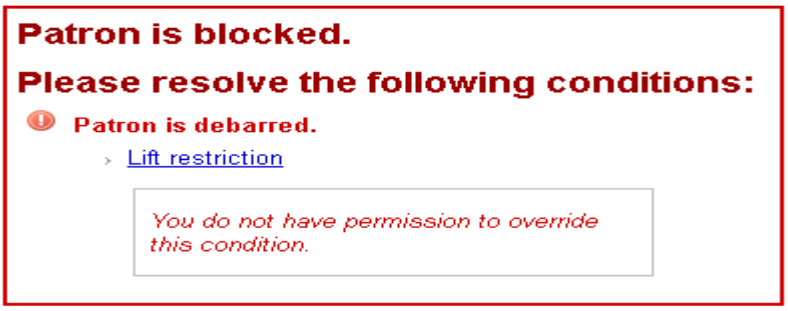
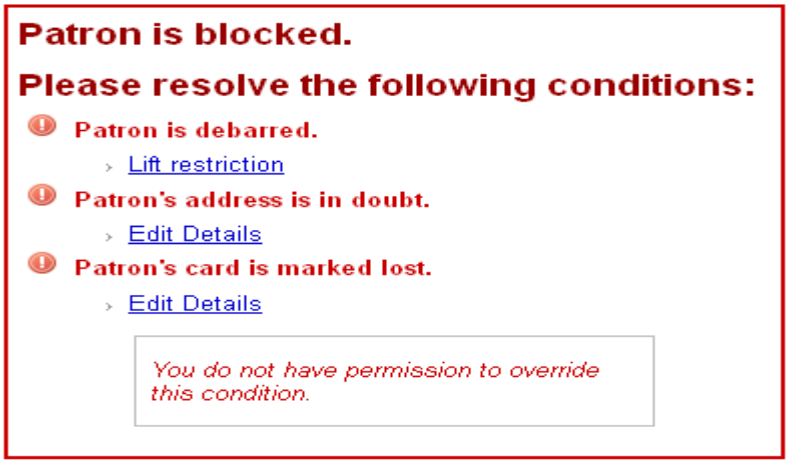

Patron is blocked.
Please resolve the following conditions:
Patron is debarred.
Lift restriction
You do not have permission to override this condition.

In this example, the staff person can lift the restriction, but is not allowed to proceed with the checkout without lifting it.

Other screen messages may appear in other situations, especially if the item is on hold for someone else or is already marked as checked out; read the message for information about how to resolve the problem.

There are several manual flags which may be set in the patron record that will show as warnings and block checkouts.

On the checkout tab you may see any/all of these messages:


Patron is blocked.
Please resolve the following conditions:
Patron is debarred.
Lift restriction
Patron's address is in doubt.
Edit Details
Patron's card is marked lost.
Edit Details
You do not have permission to override this condition.

On the patron Details page, you may see any/all of these messages:

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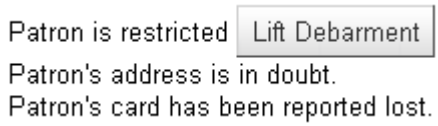
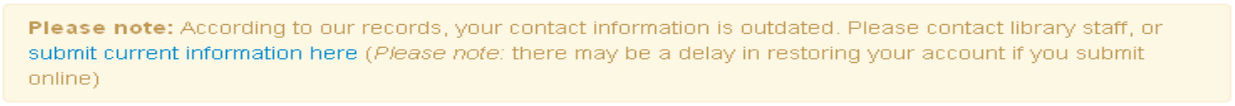


Gone no Address: if you need the patron to provide correct information before allowing them to place more holds or check out items, choose this account flag. In the patron Details screen, this phrase will appear under the patron's name.

- Patron's address is in doubt.

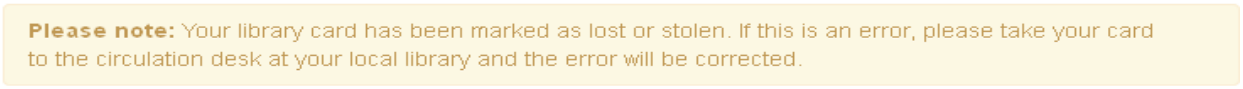
A message will also appear to the patron at login in the Discovery Layer:


Please note: According to our records, your contact information is outdated. Please contact library staff, or submit current information here (Please note: there may be a delay in restoring your account if you submit online)

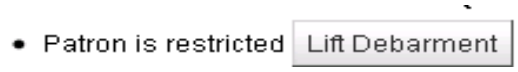
Lost Card: if the patron has called you to tell you their library card is lost, or a card is found and brought to your library, set this account flag. In the patron Details screen, this phrase will appear under the patron's name.

- Patron's card has been reported lost

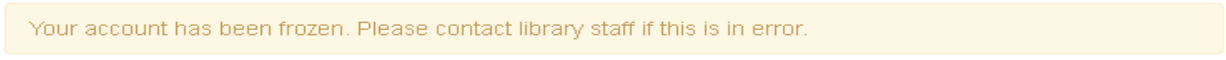
A message will also appear to the patron on login in the Discovery Layer:


Please note: Your library card has been marked as lost or stolen. If this is an error, please take your card to the circulation desk at your local library and the error will be corrected.

Debarred: if you wish to manually block a patron from placing holds or checking out items, set this flag in the patron's account. In the patron Details screen, this phrase and button will appear under the patron's name.



A message will also appear to the patron on login in the Discovery Layer:



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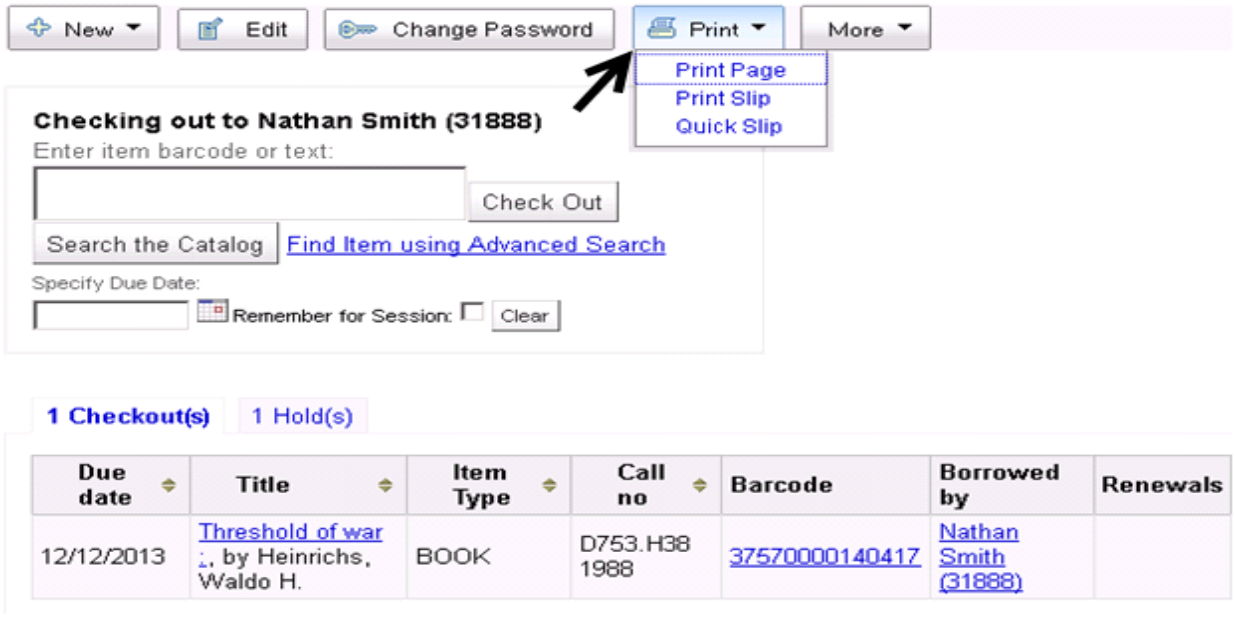
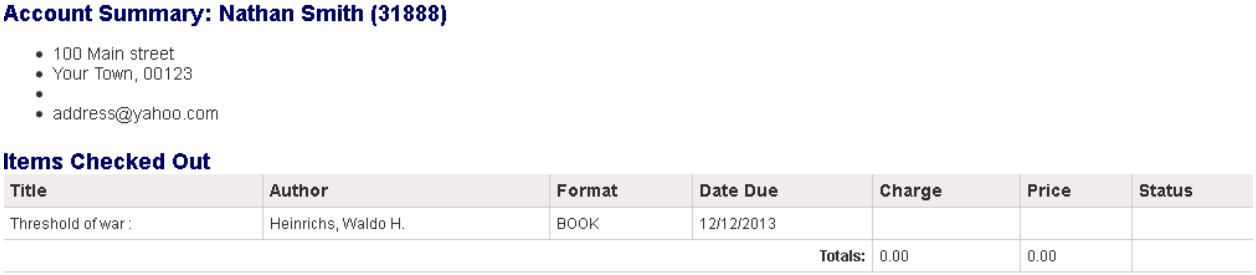
4.3 Receipt Printing

After completing all checkouts, if desired you can print a receipt for the user. (The syspref printcirculationslips must be turned on.) On the Checkouts tab click the Print button. This has three options, Print Page, Print Slip, and Print Quick Slip:



Print Page opens a new browser window with a simplified display; use the browser's print function to print it.



Print Slip will show all items presently checked out to the user; Print Quick Slip will only show those items checked out today. Both will open a browser window and immediately try to print that screen:

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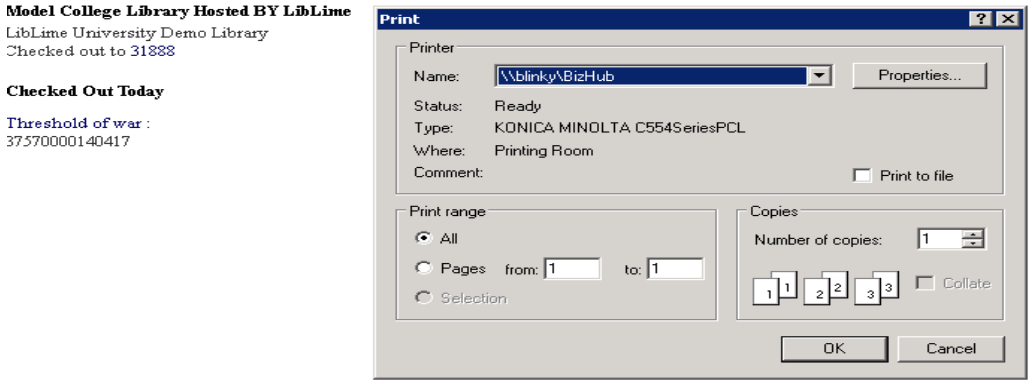

The text for these printouts is hardcoded and cannot be altered.

You can also print receipts from the main patron details page (see Patrons section of the manual).

4.4 Renewing Items for a Patron

The number of renewals allowed is determined by the circulation policy controlling that particular item type/patron category checkout. Patrons have the ability to renew their own materials from their Discovery Layer account, but staff members can also do renewals if needed. On either the patron Checkout tab or the patron Details tab, the screen shows a list of items currently checked out. One column shows renewal status. In this example, the item is on hold for someone else and thus should not be renewed. The patron will not be able to renew this item through the Discovery Layer, but a staff person can do it if desired.

Click the Override blocked renewals box, and the screen changes to show a renewal link:

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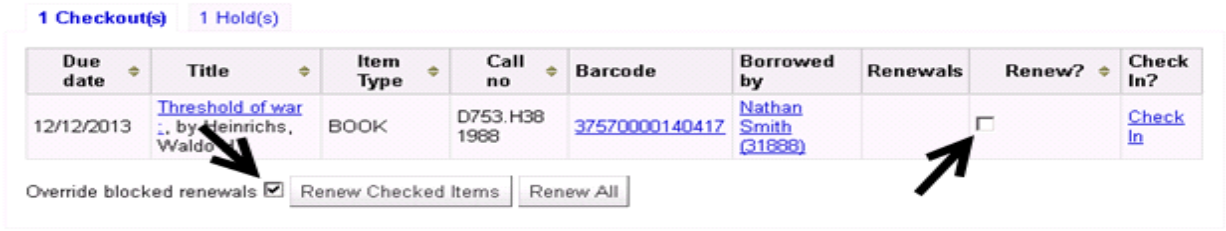
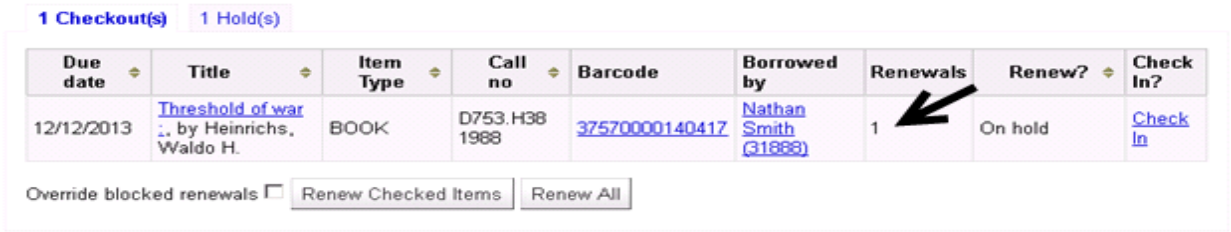
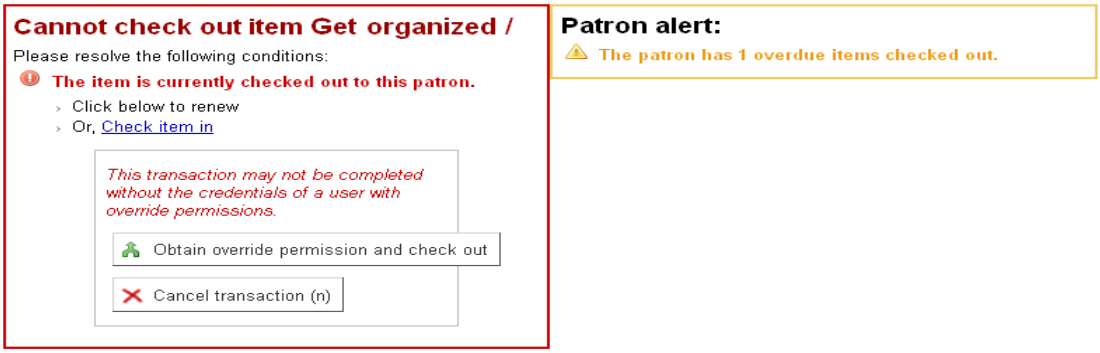


If a user has multiple items out, you can click the Renew All button to renew everything. Otherwise, check the Renew box for the desired item and click the Renew Checked Items. The renewal will be done and the number of renewals will show in that column. The renewal status for this item reverts to On hold. (Because this renewal was done the same day as the checkout, the due date hasn't changed in this screenshot. It would for a normal renewal.)



Renewal loan periods are usually the same amount of days as the original loan period (controlled by syspref RenewalPeriodBase). When an item is renewed, the system bases the new loan period on the date the item is renewed. The new loan period is NOT an extension of the old loan period, unless the patron renewed the item on the due date.

You could also renew the item by checking it out again to the same patron, on the Checkout tab, although that is usually more difficult. In that case, you would get a warning message, and your system may or may not allow you to override and continue:


Cannot check out item Get organized /
Please resolve the following conditions:
The item is currently checked out to this patron.
Click below to renew
Or, Check item in
This transaction may not be completed without the credentials of a user with override permissions.
Obtain override permission and check out
Cancel transaction (n)
Patron alert:
The patron has 1 overdue items checked out.

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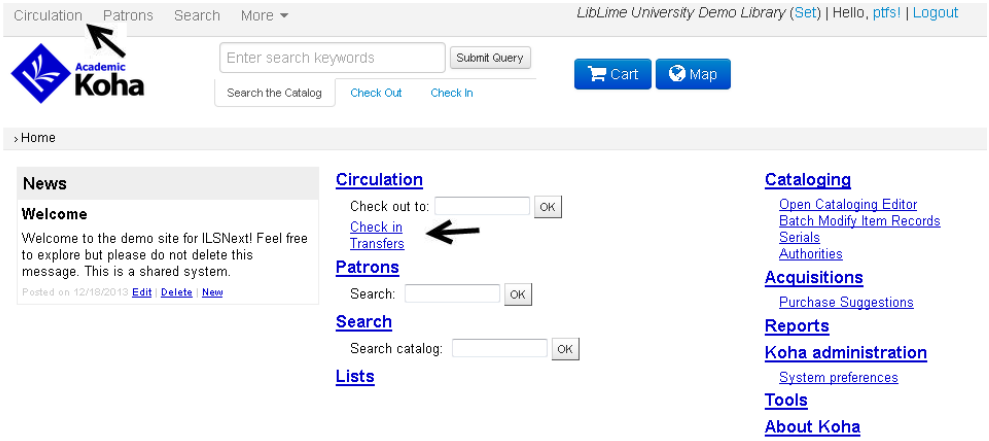
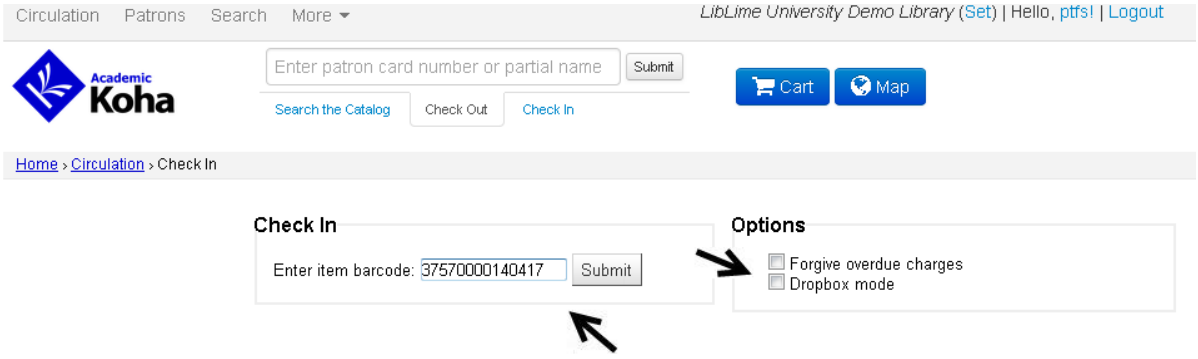
4.5 Checking In

In the DLS, items are checked in not only to return them from a checkout but also to trigger holds, clear transits, and mark lost items as found. Although a Check In option shows on a patron's screen, it is best to do checkins from the Circulation menu. You can get to that menu either from the Circulation link on the staff client home page, or from the Circulation menu link at the top of each screen:



Under Circulation, Check In, scan or type the item's barcode into the box:



Depending on the granular permissions assigned to your staff user account, you may also see options to Forgive Overdue Charges, or use Dropbox Mode.

Forgive Overdue Charges prevents overdue fines from being assessed on the items you are checking it. To exit the Forgive Overdue Charges mode you must un-check the box and then click on the submit button OR un-check the box and check in an item before leaving the checkin screen. If you don't do this, when you leave the check in screen and come back to it later, it will still be in the Forgive Overdue Charges mode.

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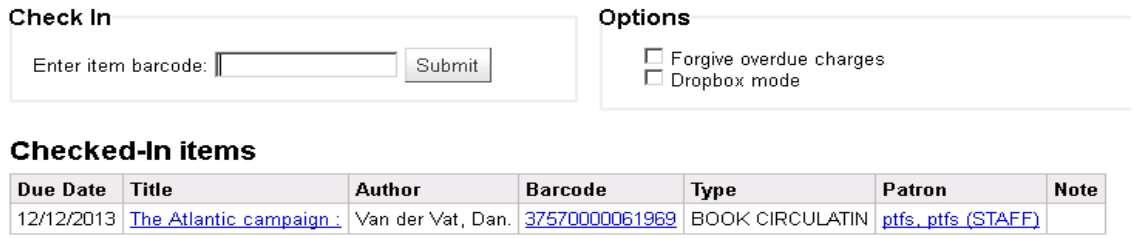
Dropbox Mode is used to check in items from the overnight book drop. Items will be checked in (return date) using the last date, before today, that your library was open. The system automatically sets the last date as determined by your library's calendar, so it is important that your calendar is accurate. To exit the Dropbox Mode you must un-check the box and then click on the submit button OR un-check the box and check in an item before leaving the checkin screen. If you don't do this, when you leave the check in screen and come back to it later, it will still be in the Dropbox Mode.

Click Submit to perform the checkin. If there are outstanding holds, or if the item is being checked in at another branch than the owning library, you will be alerted by screen messages:

Hold Found: Threshold of war :
Hold for:
ptfs, ptfs (admin_2)
100 Main street
Your Town 00123
Transfer to: LibLime University Demo Library
Confirm hold and Transfer
Print slip, Transfer, and Confirm
Ignore
Check In
Enter item barcode:
Submit
Options
Forgive overdue charges
Dropbox mode
Checked-In items
Due Date | Title | Author | Barcode | Type | Patron | Note
11/22/2013 | Threshold of war : | Heinrichs, Waldo H. | 37570000140417 | BOOK CIRCULATIN | Smith, Nathan (STUDENT) |

At this point, you can confirm the hold and place the item in transit (optionally printing a slip to put in the item), or ignore the hold and keep the item at this location.

If there are no holds, and the item is being checked in at its home location, you will just see a confirmation screen:


Check In
Enter item barcode:
Submit
Options
Forgive overdue charges
Dropbox mode
Checked-In items
Due Date | Title | Author | Barcode | Type | Patron | Note
12/12/2013 | The Atlantic campaign : | Van der Vat, Dan. | 37570000061969 | BOOK CIRCULATIN | ptfs, ptfs (STAFF) |

Other screen messages may appear in other circumstances. For example, if an item was marked lost, then checked in, the system will alert you:

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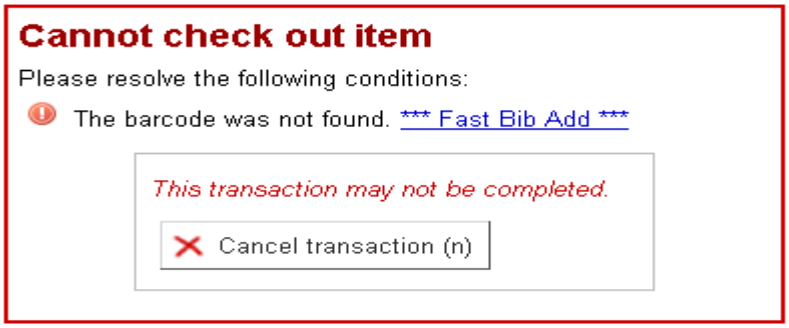
See lost item handling for more information

4.6 Fast Add at Checkout

In certain circumstances, you may need to check out an item that is not in your database. This can happen with ILL items or with old items that may have been missed when the collection was first cataloged online. If a patron has an item to check out and it either has no barcode or that barcode isn't in the database, you will get an error message. You can also trigger this by entering a nonsense or nonexistent barcode:


Cannot check out item
Please resolve the following conditions:
The barcode was not found. *** Fast Bib Add ***
This transaction may not be completed.
Cancel transaction (n)

If you have permission to create one, you can click the Fast Bib Add link in this error screen. That brings up an edit screen where you can enter brief information about the item. At minimum, you should enter a title and item type, and check Brief Circulation Record under Item Attributes (see that section under Cataloging). Your site may set policies about creating and using Fast Add records, such as always using a call number of "FAST ADD" or some other identifier. Be sure your library is selected if you have multiple branches. The form picks up and uses the barcode you entered at checkout.

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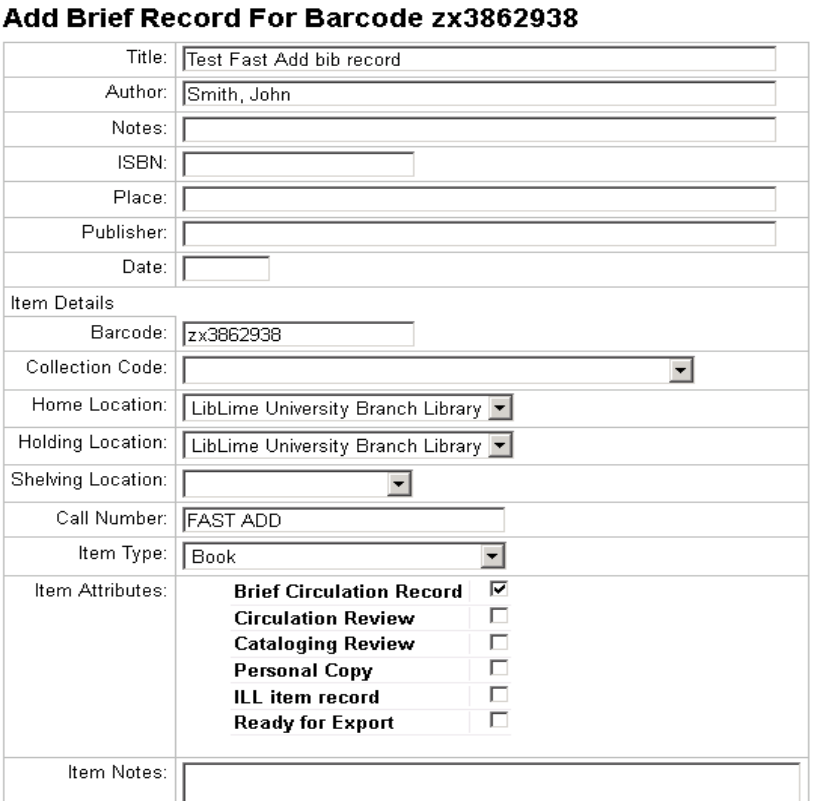
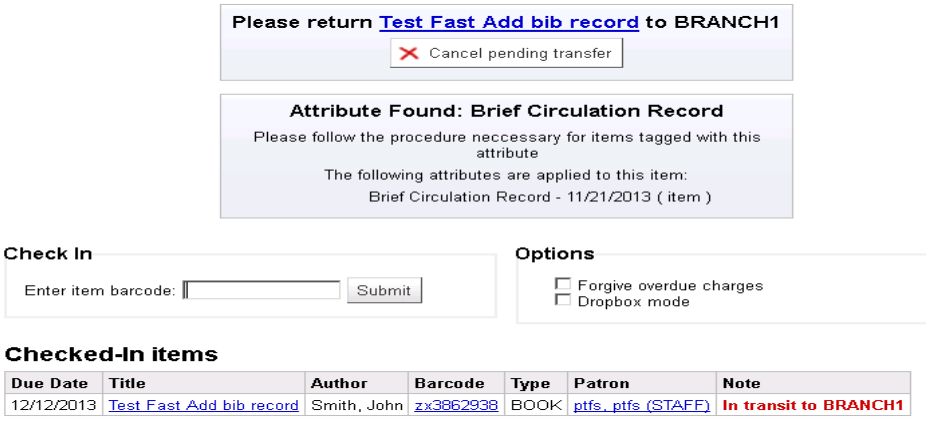


Enter any other information available, and click the Confirm Add button at the bottom of the form. The brief title/item records are created, and the item is checked out to the user. When the item is checked in, the Brief Circulation Record setting is cleared, but it triggers a screen warning:


Please return Test Fast Add bib record to BRANCH1
Cancel pending transfer
Attribute Found: Brief Circulation Record
Please follow the procedure neccessary for items tagged with this attribute
The following attributes are applied to this item:
Brief Circulation Record - 11/21/2013 (item)
Check In
Enter item barcode:
Submit
Options
Forgive overdue charges
Dropbox mode
Checked-In items
Due Date | Title | Author | Barcode | Type | Patron | Note
12/12/2013 | Test Fast Add bib record | Smith, John | zx3862938 | BOOK | ptfs, ptfs (STAFF) | In transit to BRANCH1

Staff should then put the item aside for cataloging staff to handle.

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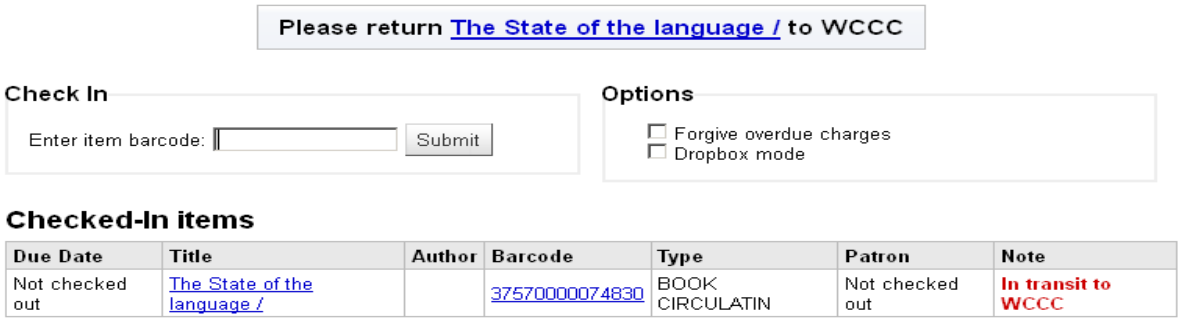
4.7 Handling Transits

Any multi-library system that allows borrowing between branches will have to deal with transfers between branches. Items that belong to one branch may be returned at another, or a patron may place a hold on something with a pickup location at another branch. Items may be placed in transit either automatically (by confirming a transfer from a checkin message) or manually. A checkin message could appear either for a pending hold with pickup at another branch:

or for a checkin at another branch than the owning library:



To put something in transit manually, go to Circulation, Transfer. Select the destination library from the pull-down, and enter the barcode:

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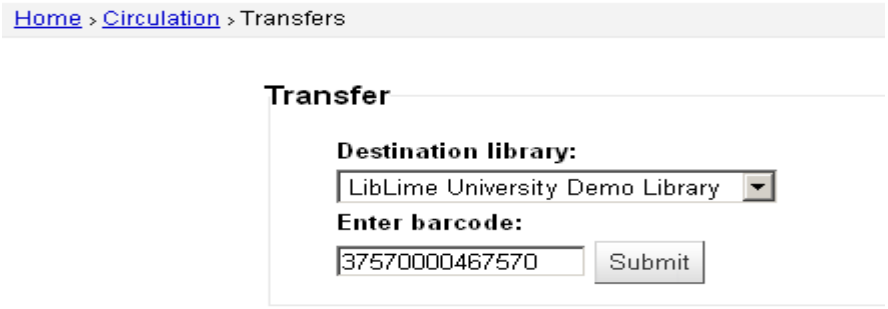
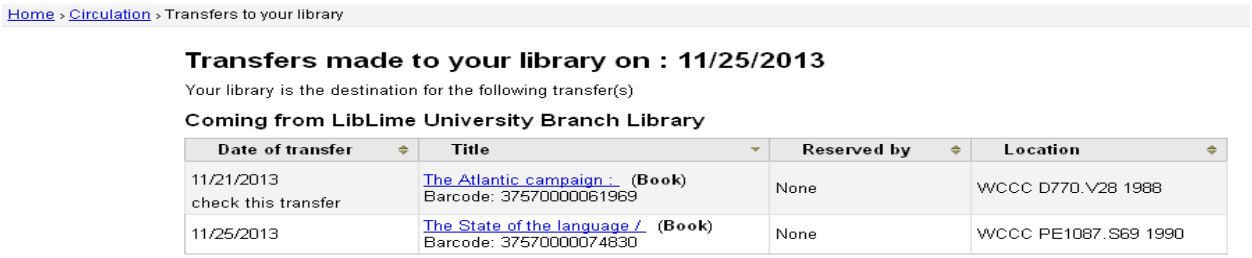
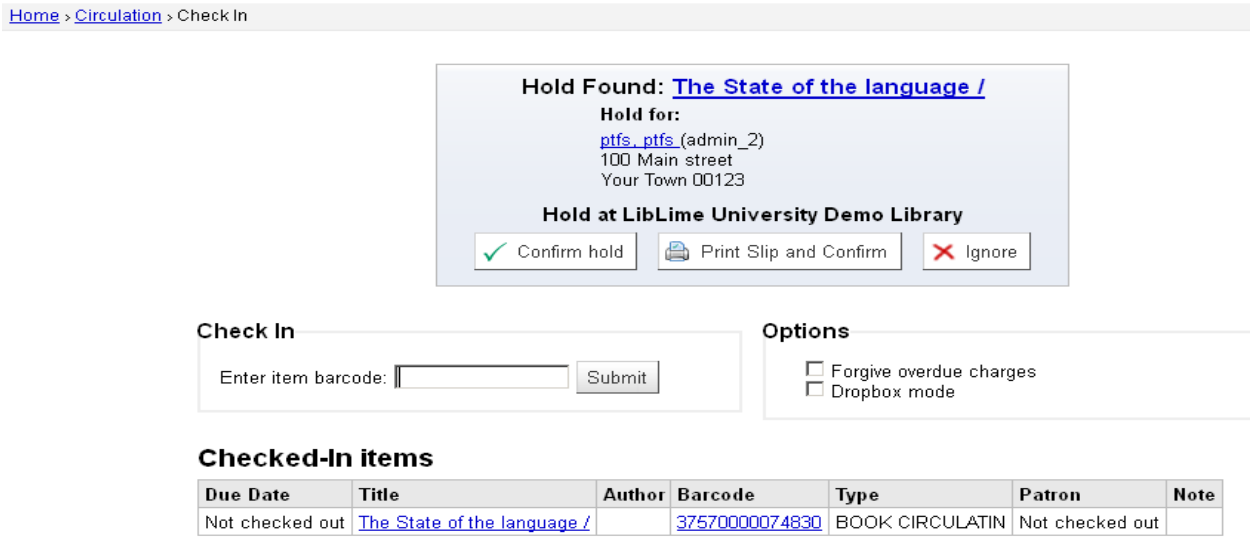


Library staff can always see what items are in transit under Circulation, Transfers to Receive:



When the item physically arrives at the destination, staff must run it through a checkin to clear the transit and trigger any pending holds:



If no holds are pending, the item may be shelved. The checkin will give a “not checked out” message:

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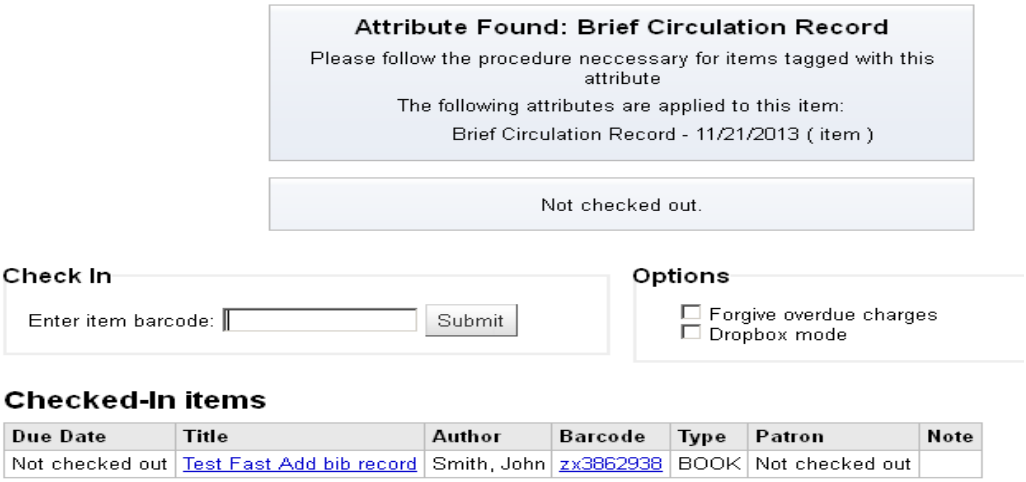
You may also see messages about brief records, or other types of checkin messages. Deal appropriately with them, as with any checkin.



4.8 Tracking In-House Use

Some libraries need to keep statistics on items that are used in the library but not checked out. This can be done with a special patron. Create a patron category of type Statistical (see Administration, Patron Categories). Then create a patron record with that category; name it something like INHOUSE USER. Each day, collect materials that have been used and left out. In the DLS, go to that patron record and check those items out to that user. Instead of doing an actual checkout, this will create an entry in the statistics table for "localuse" (in-house use). You can later run reports to get counts for these entries.

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4.9 Inventory

Inventory means taking stock of your collection and identifying what is actually present. There are two ways to use the Tools, Inventory/Stocktaking feature:

- Use the DLS's guided form to define the items you want to take inventory OR
- Upload a barcode file and assign a last seen date to items in bulk (To obtain a barcode file, you will need to scan the barcodes using a handheld scanner, laptop, tablet, or smartphone with the ability to read barcodes and output a text or .csv file)

Alternatively, if your collection is small enough and you can manage it technically, go through your stacks with a laptop logged into the staff client and a barcode scanner, and check in every item. This will update the "last seen" date and will also alert you to any other problems (lost, wrong branch, etc.). You can also use this method for just a portion of your collection, if that's all you need to check at the time.

4.9.1 Uploading a File of Barcodes

Loading a file of barcodes into the tool has the merit of being an actual representation of what is in your stacks, but requires more up-front effort to go and scan everything. You can use a laptop with barcode scanner, and scan everything into a text file, or use a specially-designed scanner which can store and output a file of barcodes. To load a barcode file, open the inventory tool and go to the right-hand side of the screen. Use the Browse button to choose a barcode file to upload (this file is produced from your inventory scanner). Then set the Date Last Seen using the calendar pop-up. Click 'Submit and that file of barcodes will be processed.

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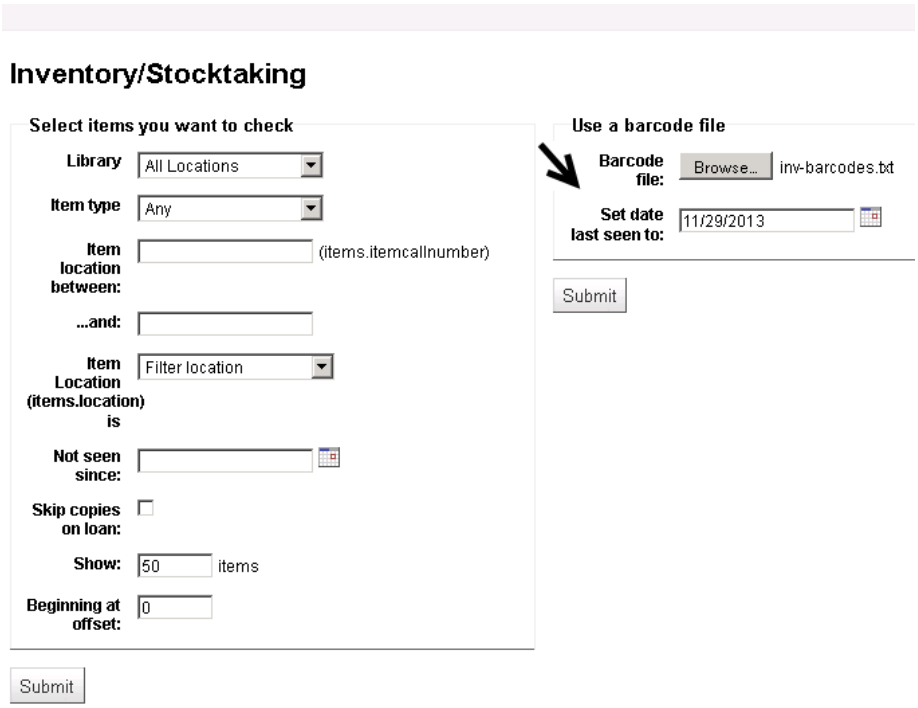

You can do this as an incremental process – scan a section, upload that file and process, then scan another section.

4.9.2 Using the Inventory Tool

This part of the tool can be used if you want to manage a section at a time (defined by call number, item type, shelving location). An easy way to work with this part of the tool would be to take a laptop out into the stacks, and compare the screen results to the shelf. In this example, it will check a particular call number range at one branch.

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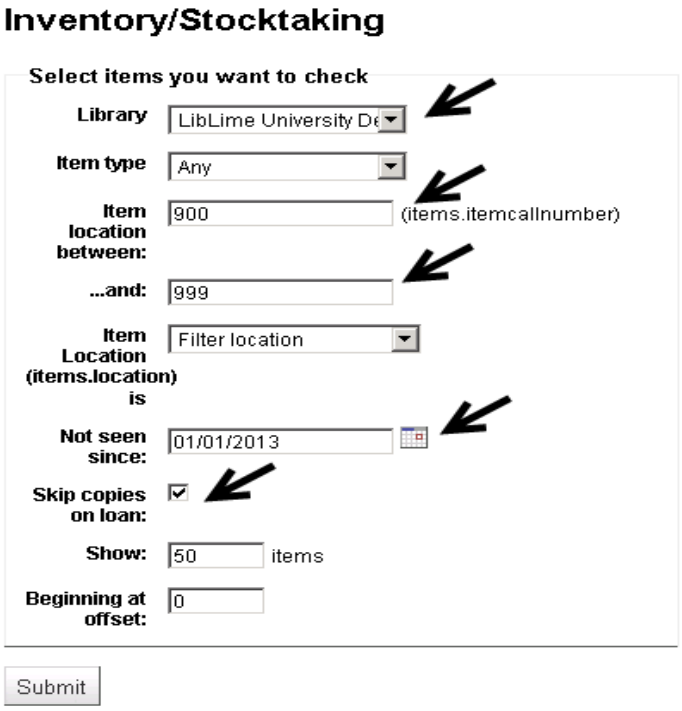

Make your desired selections on the left-hand side of the screen; you don't have to make a selection on all fields, just the ones you want:

- Library -- Choose which branch you want to take inventory on; Choose All Locations to take inventory on all branches.
- Item type -- Choose an item type to take inventory on.
- Item location between ... and -- Choose a range of item call numbers to take inventory on. The format here is the call number found in the items.itemscallnumber field (for instance, 937.23). You can be very generic; A to Z or 000 to 999 are acceptable ranges.
- Item location – The labeling is somewhat misleading; the above refers to call number; this field searches the shelving location.
- Not seen since -- Choose a date from the calendar pop-up.
- Show -- Define how many results you want to view on a page.
- Beginning at offset -- Tells the system where in the list of results to start display. For instance, if this field is set to '0', the results set will start displaying at the beginning of the range defined. However, if the field is set to something like '50' then the results set will start displaying at the 50th item defined by the range you have set. This field MUST be a numeric value.

When you have made all your selections, click Submit. The system then displays screens of the matching items. To mark items as seen, check the box next to each item you want to add and

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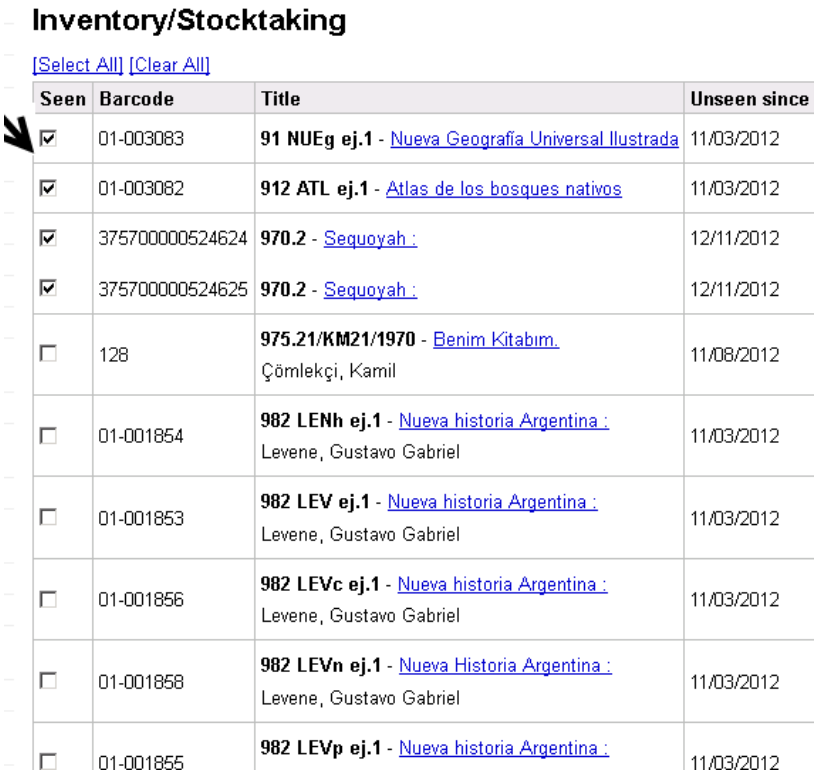
click the Mark Seen or Mark Seen and Continue button at the bottom of the screen. You can also use the Select All or Clear All links at the bottom to affect everything on the screen.



Scroll to the bottom for the action buttons:

Mark Seen will flag only the records on this particular screen. Mark Seen and Continue will flag these records and continue to the next screen. In the initial setup screen, you can set the Show field to a high number (like 200) if you want to minimize the number of times you must click Mark Seen and Continue.

4.9.3 Cleaning Up Inventory Problems

Once finished with either form of inventory, you can run the inventory tool again to see what items were not seen during the first pass. You can also create a SQL report to select items whose

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last seen date (items.datelastseen) is either NULL or less than the date you selected to start inventory. This list is your "cleanup" list. Here's a sample SQL report with a limiter on item's homebranch:

```
select biblio.title, biblio.author, items.barcode, items.itemcallnumber,
items.location, items.homebranch, items.holdingbranch, items.datelastseen from
items JOIN biblio on (items.biblionumber = biblio.biblionumber) where
items.homebranch = 'MAIN' and (items.datelastseen IS NULL or
items.datelastseen < '2013-01-01') order by items.cn_sort
```

The items.cn_sort field is the internal sorting field used for call numbers – it's more reliable than the actual call number for report sorting.

4.10 Overdue Report

The overdue report is one of several delivered reports that may be useful in monitoring circulation. From the main Circulation menu, click Overdues. There is a screen warning; the report can require a lot of system resources on large systems. If your site has the FilterBeforeOverdueReport syspref turned on, you will be required to select one or more filters (branch, patron category, etc.) before you can run the report.

These options are also available after the report is run, if you need to redo your selections.

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This report can be useful to track outstanding overdue items and their accrued fines. You can also download the list as a .csv file. Although obscured in this screen shot, there are links to the patron's patron record and display of the patron's phone number.

4.11 Holds

Placing a hold on a title or an item allows staff and patrons to reserve materials that are currently checked out, on the shelf at another location or otherwise temporarily unavailable for immediate checkout. Depending on how your system is configured, holds may be allowed for materials presently on the shelf at the patron's location. In most multi-library systems all resources are shared, and a title-level hold at any library may be filled by any available copy in the system. Some libraries restrict holds to only their own items/patrons; this can be done through the circulation rules.

When more than one patron places a hold on the same title, the name of each patron is placed in a hold queue (waiting list) in the date order of request. When an item that can fill holds is checked in at any eligible library, the system will trap that item for the first active hold with that check-in location selected as the pickup location. If there is no active hold at that check-in location, the item will be trapped for the first active hold in the queue, regardless of pickup location.

Patrons may place a hold from the Discovery Layer (if syspref RequestOnOpac is on), or staff can place a hold for a patron. If your system is configured to allow on-shelf holds (syspref AllowOnShelfHolds), then holds can be placed for items which are currently available. In that case, the request would show on the Holds Queue report; staff would need to locate the item, run it through checkin to trigger the hold, and place it on the holds shelf for pickup. The syspref ReservesMaxPickUpDelay sets how long a patron has to come and get the item – seven days is a common setting, but it depends on library policies. After that time, the hold can be canceled and the item is available for the next user.

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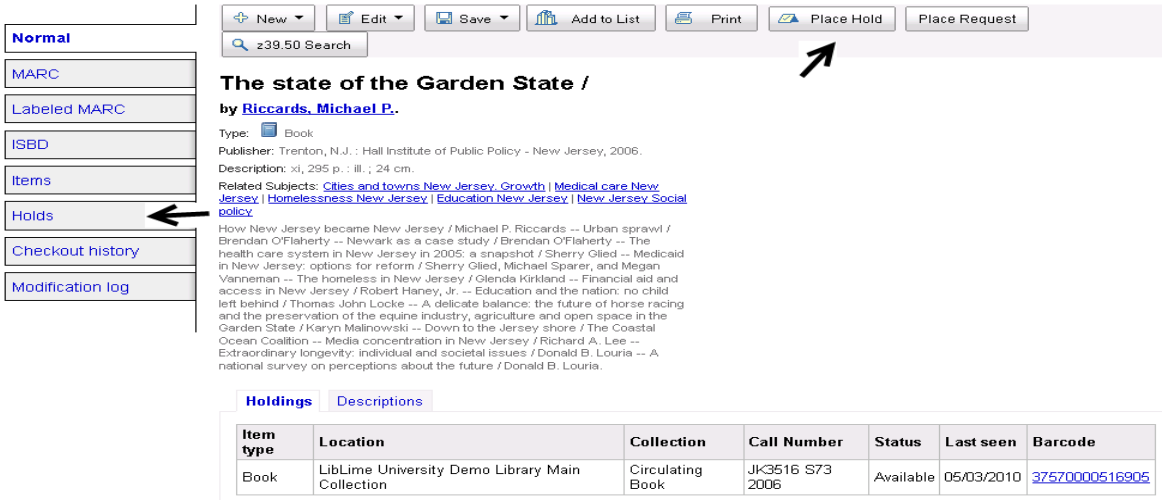
Holds can also be suspended (by staff or the patron) either for an indefinite period or to resume on a specific date.

4.11.1 Item-Level versus Title-Level Holds

A title-level hold means that any copy of a particular title can fill the hold. An item-level hold means that only that particular copy can fill the hold – even if other copies are available, the patron's hold will wait for that copy to become available. A site may disable item-level holds in the Discovery Layer with the syspref OPACItemHolds. This will force patrons to always place title-level holds. Staff can always place item-level holds if needed. For most titles with multiple identical copies, a title-level hold is preferred. Only use item-level holds when a particular copy is needed, such as a specified volume of a magazine or DVD set.

4.11.2 Placing a Hold for a Patron

If staff need to place a hold for a patron, the first step is to search for the title. In the staff client, bring the title record to the screen. You can either click the Place Hold button at the top, or the Holds tab at the left.


New
Edit
Save
Add to List
Print
Place Hold
Place Request
z39.50 Search
Normal
MARC
Labeled MARC
ISBD
Items
Holds
Checkout history
Modification log
The state of the Garden State /
by Riccards, Michael P..
Type: Book
Publisher: Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.
Description: xi, 295 p. : ill. ; 24 cm.
Related Subjects: Cities and towns New Jersey, Growth | Medical care New Jersey | Homelessness New Jersey | Education New Jersey | New Jersey Social policy
How New Jersey became New Jersey / Michael P. Riccards -- Urban sprawl / Brendan O'Flaherty -- Newark as a case study / Brendan O'Flaherty -- The health care system in New Jersey in 2005: a snapshot / Sherry Glied -- Medicaid in New Jersey: options for reform / Sherry Glied, Michael Sparer, and Megan Vanneman -- The homeless in New Jersey / Glenda Kirkland -- Financial aid and access in New Jersey / Robert Haney, Jr. -- Education and the nation: no child left behind / Thomas John Locke -- A delicate balance: the future of horse racing and the preservation of the equine industry, agriculture and open space in the Garden State / Karyn Malinowski -- Down to the Jersey shore / The Coastal Ocean Coalition -- Media concentration in New Jersey / Richard A. Lee -- Extraordinary longevity: individual and societal issues / Donald B. Louria -- A national survey on perceptions about the future / Donald B. Louria.
Holdings
Descriptions
Item type
Location
Collection
Call Number
Status
Last seen
Barcode
Book
LibLime University Demo Library Main Collection
Circulating Book
JK3516 S73 2006
Available
05/03/2010
37570000516905

Either brings you into the Holds tab, where the first step is to search for the patron record. Enter a cardnumber or name:

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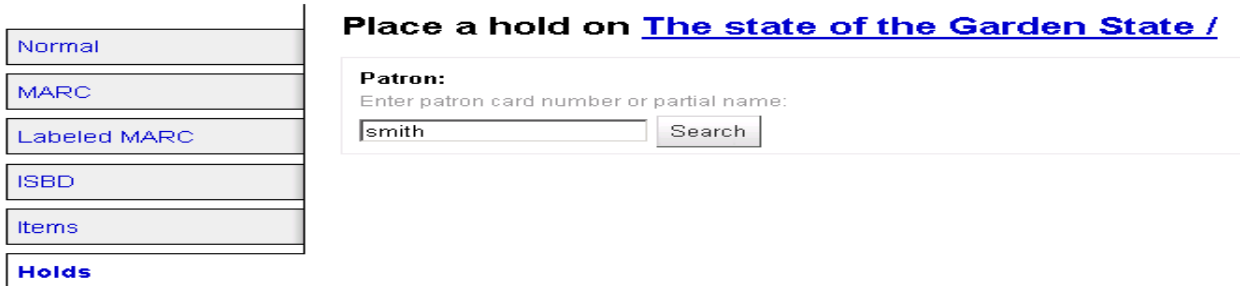
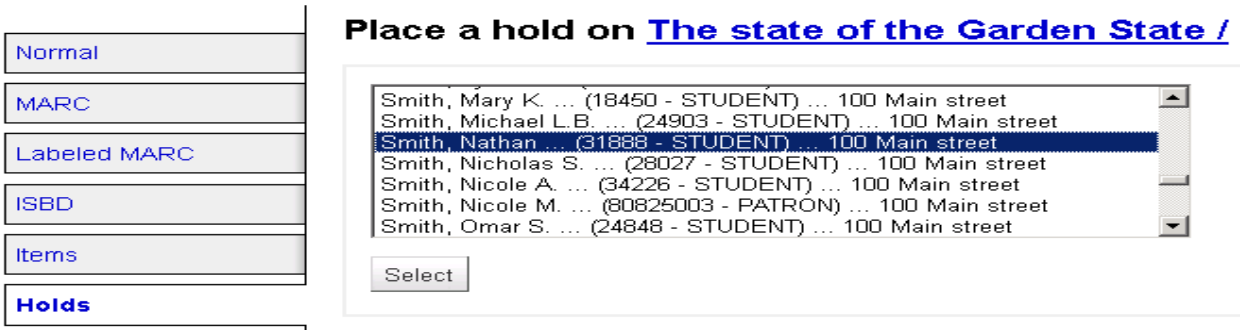
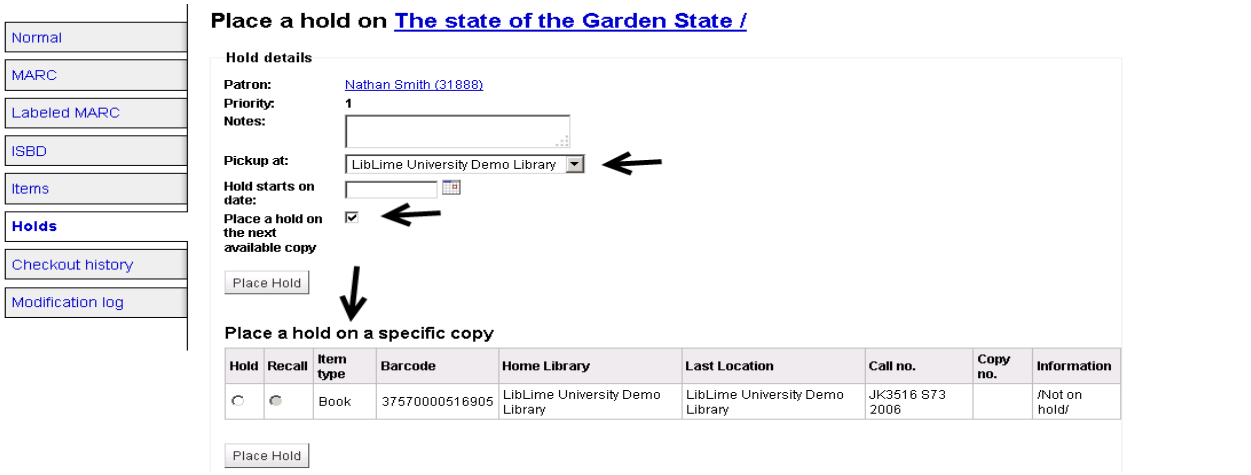


If there are multiple matches, choose the person you want from the scroll box and click Select.


Normal
MARC
Labeled MARC
ISBD
Items
Holds
Place a hold on The state of the Garden State /
Smith, Mary K. ... (18450 - STUDENT) ... 100 Main street
Smith, Michael L.B. ... (24903 - STUDENT) ... 100 Main street
Smith, Nathan ... (31888 - STUDENT) ... 100 Main street
Smith, Nicholas S. ... (28027 - STUDENT) ... 100 Main street
Smith, Nicole A. ... (34226 - STUDENT) ... 100 Main street
Smith, Nicole M. ... (80825003 - PATRON) ... 100 Main street
Smith, Omar S. ... (24848 - STUDENT) ... 100 Main street
Select

The next screen gives you several options:



The pickup location defaults to the patron's home library; in multi-library systems you may want to change this. The default setting is to place a title-level hold (Place hold on next available copy). However, you could uncheck that box and click a radio button next to a particular item for an item-level hold. If there is only one item attached, as in this example, that choice is irrelevant. There is also an option to trigger a recall – see that section for more details on recalls.

After making your selections, click either Place Hold button. The screen changes to show the hold and its place in the priority queue:

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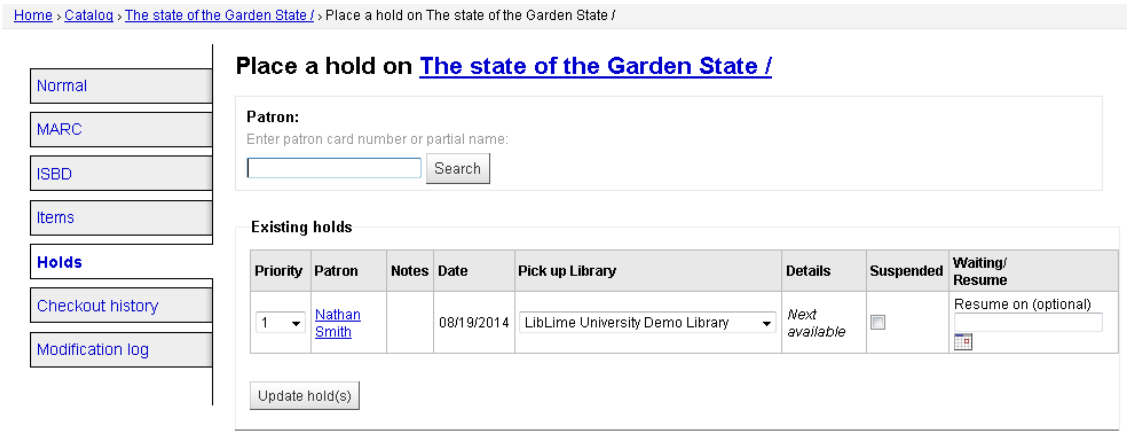

You can then place holds on the title for other patrons, or move on to another screen.

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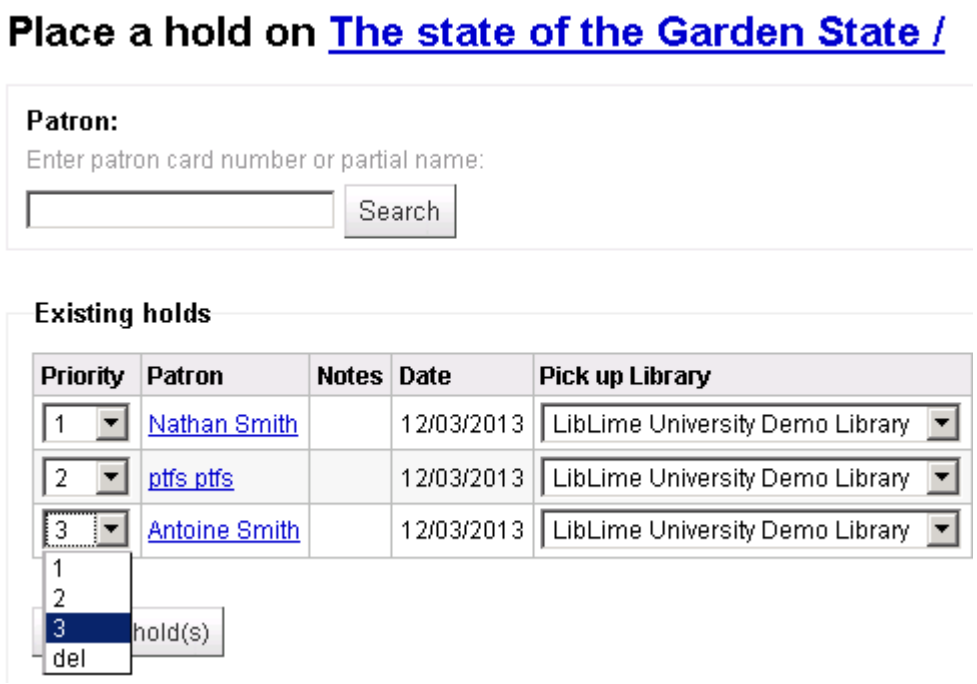
4.11.3 Reordering the Priority Queue

If there are multiple holds on a title, staff can change the priority or delete a hold altogether. Priority is based on the order in which holds were placed, and under normal circumstances you will leave it alone. However, occasionally you may want to allow a patron to get an item out of order. On the Holds tab, if you click the pull-down in the Priority column, you can change the order by changing the number for each entry. You can also delete a hold, or change the pickup library.



When you've changed all the entries, click the Update holds button to record the changes. You cannot change priority on a hold that has been triggered ("waiting") or is in transit.

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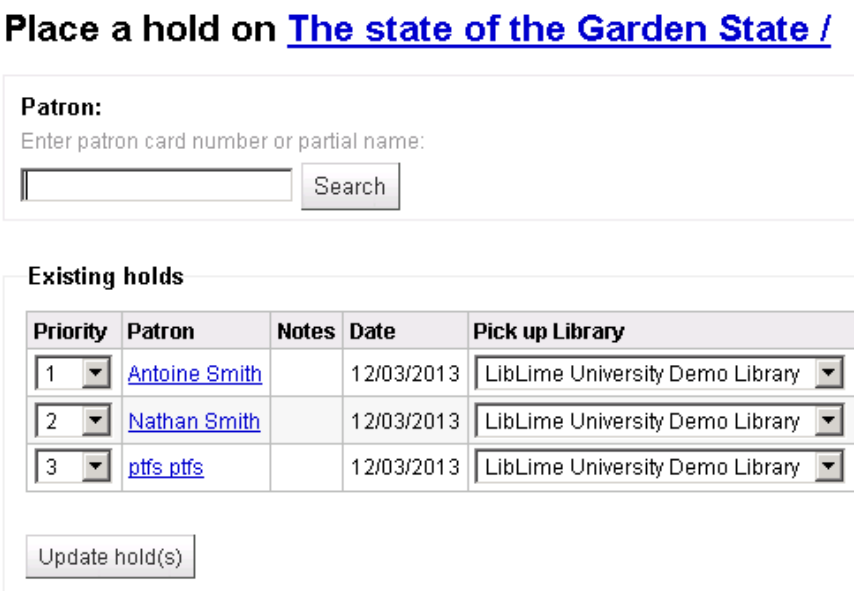

If you delete a hold, the others will reorder priority automatically – no need to manually change priority.

4.11.4 Suspending Holds

Holds that have not been triggered can be suspended either by the user through the Discovery Layer (see that section) or by staff members. A hold can be suspended indefinitely, until the patron chooses to resume it, or it can be suspended with a "resume on" date. A cron job (misc/cronjobs/holds/resume_suspended_reserves.pl) runs nightly to reactivate any suspended holds for the current date.

To suspend a hold in staff mode, go to either the patron record or the title record. In the patron record, scroll to the bottom of the Details screen and click the On Hold tab. You will see all holds for that patron, and can use the pulldown to select Yes for the hold(s) you want to suspend:

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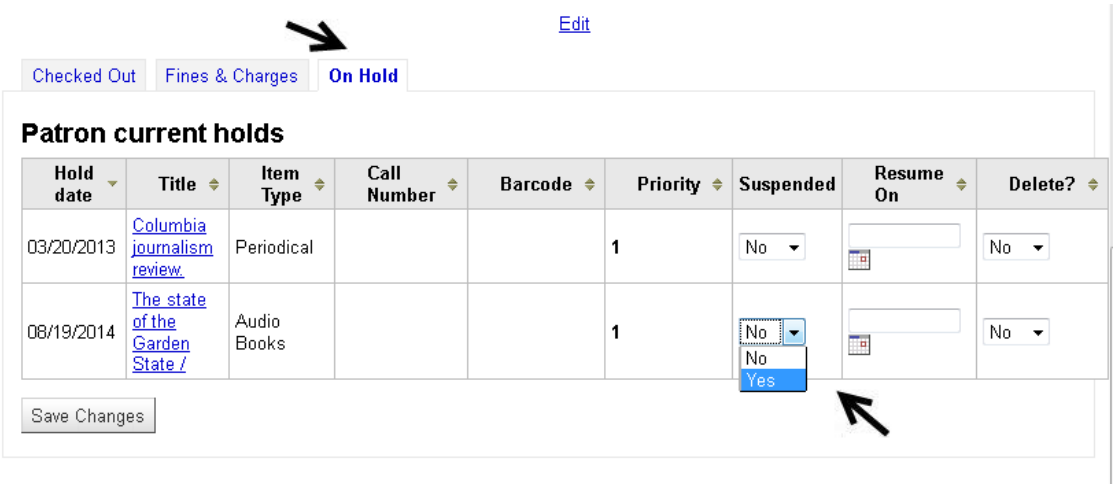
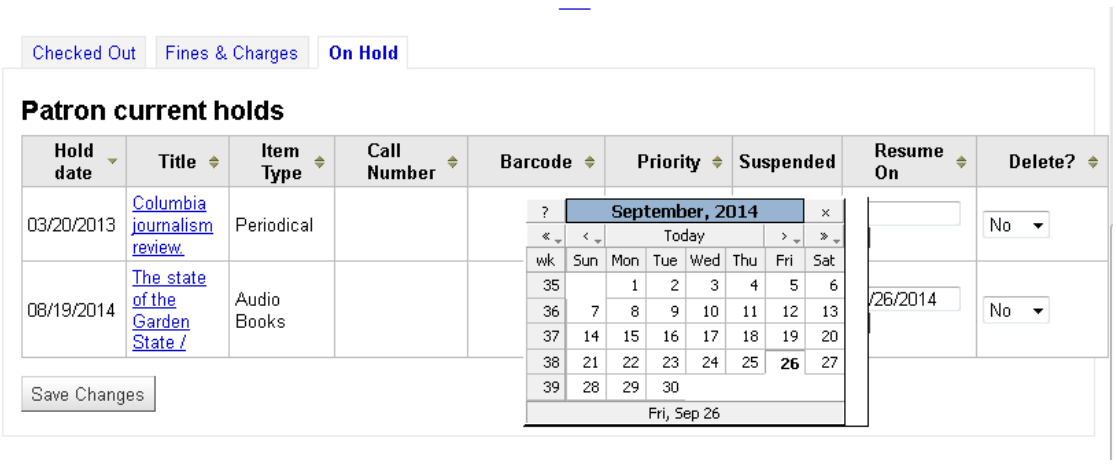
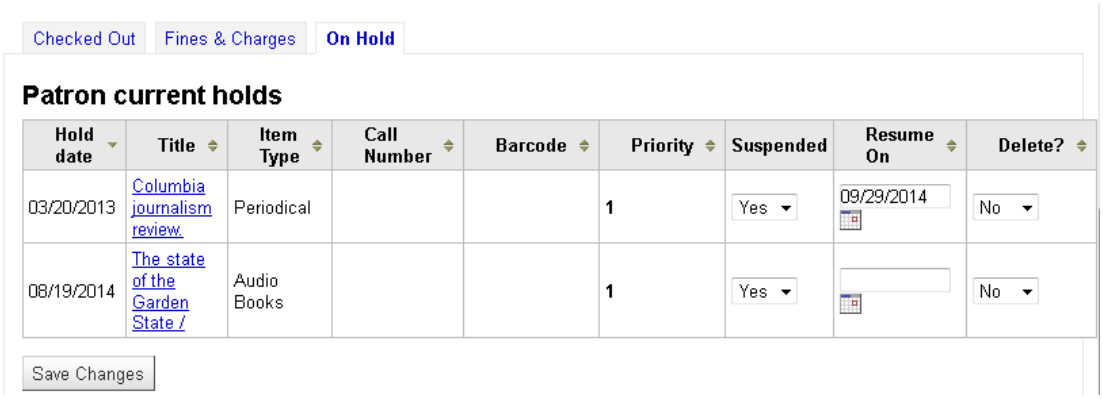


If you want to specify a resume date, click the calendar button to open the gadget. Move to the desired date and click it:



Click the Save Changes button when you are finished, and the hold will show as suspended. If a date was selected, it will display:



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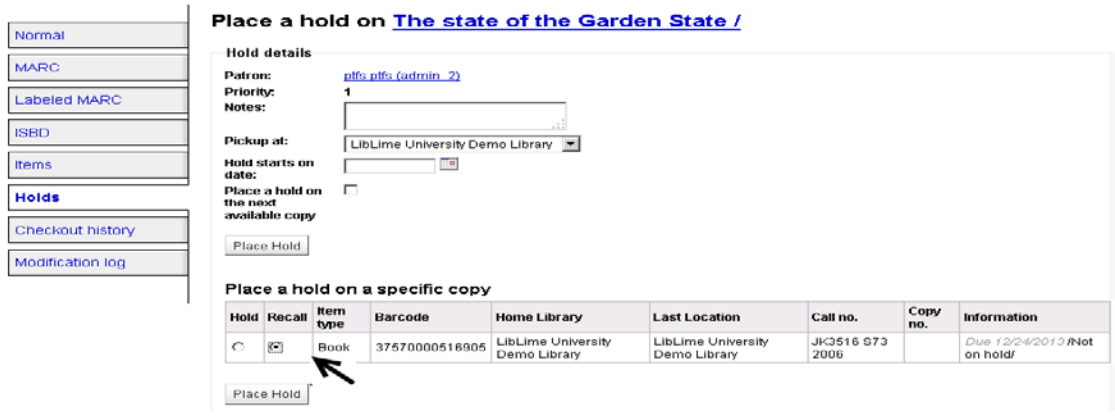
4.11.5 Recalls

A recall can be placed on an item that is loaned to another patron, if your system is configured to allow it (see system administration). Recalls are more active than regular hold requests. Regular hold requests wait for the item to be returned, while recall requests actively notify the borrower that the item is required and shortens the due date. A recall can only be placed if the item is currently checked out. Depending on your system configuration, recalls can be placed in staff mode, by the patron in the Discovery Layer, or both.

Recalling the item will:

- Shorten the loan period for the borrower, although the borrower will always be able to keep the book for a specified length of time (the "guarantee period" in the circulation policy). The loan period will be shortened according to the "recall return interval."
- Send a notice to the borrower to inform him/her that the loan period has changed, and that the item must be returned to the library, usually with a shortened due date.

In staff mode, you can opt to issue a recall when you place a hold for a patron, if a recall policy applies to the existing checkout and your staff login has permission to do so. Instead of leaving the default hold setting, click the recall radio button and then the Place Hold button:



The system will immediately generate a Recall notice to the current user. The default text will read something like this:

> The item "The state of the Garden State /" (barcode 37570000516905) has been recalled for checkout by another patron. Please return the item on or before its due date.

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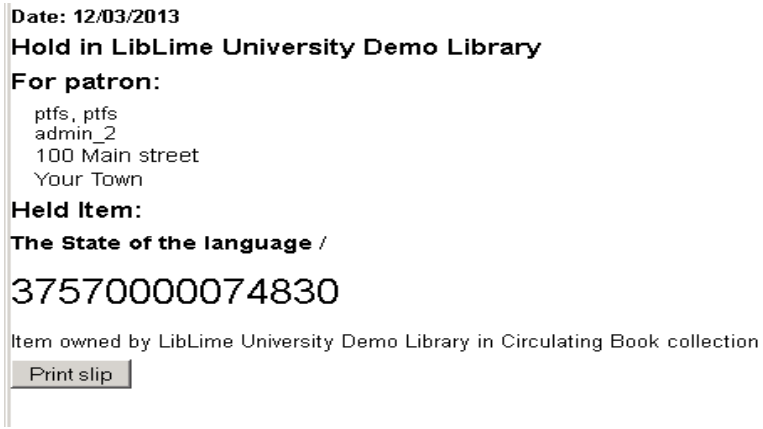
The notice text can be modified as desired (see Notices). When an item has been recalled, the patron will no longer be able to renew it through the Discovery Layer.

NOTE: Placing a hold with a recall will NOT move that patron to the head of the priority queue. The recall is issued, prompting the original borrower to return the item, but the first entry in the holds priority list will be the hold that's triggered. If staff are placing a recall for a particular patron, and want to make sure that patron gets the item first, you must manually reorder the holds priority list to make that patron first.

4.11.6 Triggering a Hold

As mentioned in the Circulation, Checkin section, when an item is checked in the system will see if there is a hold. If so, a screen message will alert staff.

Usually you will confirm the hold (with or without printing a hold slip to place in the item). Under rare circumstances you might want to ignore the hold so that you can give the item to someone else. If you click Print Slip and Confirm, the system will open a pop-up window with information about the hold:



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Any item arriving from transit or whose status is otherwise in doubt should always be run through checkin. If there are no alerts, the item can be shelved.

As soon as a hold is triggered, an email message is sent to the patron saying the item is available. The text of this message can be customized by an administrator under Tools, Notices. (Note: The patron must have the Hold Filled messaging option turned on.)

4.11.7 Holds Queue Report

If your library allows on-shelf holds, staff will need to know which items to pull from the shelves to fill those holds. Under Circulation, run the Holds Queue report (selecting a branch) to see what items are needed.

Home › Circulation › Holds Queue › Results

Holds Queue

2 items found for WCCC

Title	Collection	Shelving Location	Call Number	Enum/Chron	Barcode	Patron	Send To	Notes	Date
Who moved my cheese? : Johnson, Spencer G.P. Putnam's Sons, , 1998 : 94 p. : 22 cm. ISBN: 0399144463	CIRCULATIN	CIRCULATING	BF637.C4 J64 1998		37570000418193	[redacted]	WCCC	Please notify when it comes in	12/08/2010
Russian fairy tales / Afanas'ev, A. N. Pantheon Books, , 1973 : 661 p. : 25 cm. ISBN: 0394730909	CIRCULATIN	CIRCULATING	PG3115.A2813 1973		37570000046762	[redacted]	WCCC		12/15/2010

This report is built by a cron job (build_holds_queue.pl). Administrators can control the timing of the job with the HoldsQueueSchedule syspref, or it can be left at the default setup. The timing depends on your library's needs. It could be run once a day or every couple of hours. That script completely rebuilds the queue each time it runs. Staff can use this list to pull items from the shelf, or identify items needed from other branches.

When an item is checked in and can fill a hold, the system tries to find the first listing in the queue for that title (Hold #1). If the item is not eligible to fulfill the first hold for some reason, it goes down the list to identify and fill the next hold in the queue.

As items are pulled from the shelves, run them through checkin to trigger the holds. Once a hold has been triggered, it no longer appears on this list.

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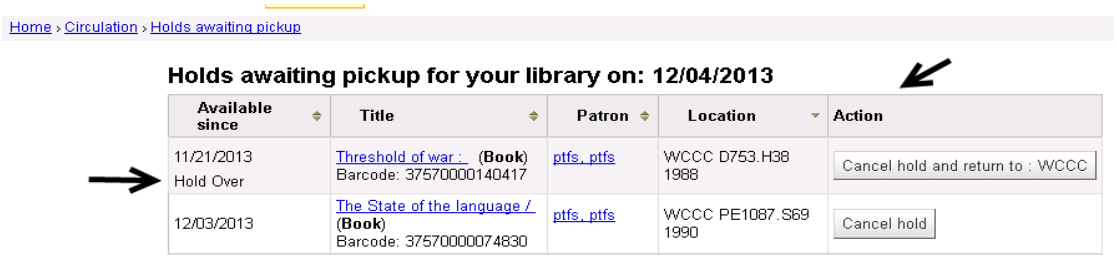
If your library does not allow on-shelf holds, the report does not need to be run regularly. However, staff should check it occasionally to make sure something hasn't slipped into the queue. For example, a staff person might have placed an on-shelf hold for a patron, but neglected to retrieve the item and trigger the hold.

4.11.8 Clearing the Holds Shelf

Once a hold has been triggered, and the email notice has been sent, the patron has a certain number of days to come and pick up the item. This time period is specified in the syspref ReservesMaxPickUpDelay. When that time period has expired, staff will need to identify items which were not picked up and clear that hold. Under Circulation, use the Holds Awaiting Pickup report to see what is on your holds shelf.



The report will identify ("Hold Over") items which have expired. You can click the button under the Action column to cancel the hold. If the item needs to be put into transit, the button will say so. If there is another hold on the item, the system will give a screen message, but you still need to run the item through checkin to trigger that hold. You may also need to put the item in transit.

Home › Circulation › Holds awaiting pickup
Holds awaiting pickup for your library on: 12/04/2013
This hold is waiting
This hold (The State of the language /) was placed by : Smith Antoine, Please retain this hold.
Submit Query

You could also create a custom SQL report to identify items and patrons; here is some sample SQL:

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7SELECT reserves.reservedate, reserves.waitingdate, reserves.reservenotes, borrowers.cardnumber, borrowers.surname, borrowers.firstname, borrowers.branchcode, biblio.title FROM reserves JOIN borrowers on (reserves.borrowernumber = borrowers.borrowernumber) JOIN biblio on (reserves.biblionumber = biblio.biblionumber) WHERE reserves.waitingdate < date(NOW() - interval 7 day) AND priority = 0 ORDER BY reserves.waitingdate

You could add a branchcode limiter, or change the number of days as needed. The report output can be downloaded to Excel.

4.12 Call Slips, Document Delivery, and other RFI Forms

Call Slip and Document Delivery functionality allows patrons to place requests on items in closed stacks or remote storage for retrieval by the staff.

Call slip allows an item to be requested for quick retrieval from closed stacks or storage for the patron to borrow. How quickly this is turned around is determined by local policies but very little time is needed to fill call slip requests, as the call slip queue is updated continuously. Once the item is received it can be checked out to the patron.

Document Delivery handles requests for copies of articles. In this case the patron requests the item by title of the publication and provides the article citation information. The work cited is copied and given to the patron; it is not loaned.

Other forms have been added to allow patrons to open informational tickets; see below.

There are several system preferences and steps needed to set up call slips and/or document delivery; see that section under in the Superlibrarian Training and Configuration Guide. The policies are applied in the circulation rules, so the option may not be visible or available on all items.

4.12.1 Placing a Request for a Patron

Most requests are placed from the Discovery Layer (see that section), but staff can also place a request for a patron. To do so, search for a title and click the Place Request button.

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New
Edit
Save
Add to List
Print
Place Hold
Place Request
z39.50 Search
Aspiration biopsy cytology /
by Zajicek, J..
Type: Book
Series: Monographs in clinical cytology ; vol. 4 ; Monographs in clinical cytology ; vol. 7 .
Publisher: Basel ; New York : Karger, 1974-1979.
Description: v. : ill. ; 25 cm.
General Note: Includes index.
ISBN: 3805514077 (pt.1).
Related Subjects: Biopsy, Needle | Cytodiagnosis
Contents:pt. 1. Cytology of supradiaphragmatic organs -- pt. 2. Cytology of infradiaphragmatic organs.

At the New Request Screen for call slip, search for the name of the patron making the request and the type of request desired:

After clicking Continue, you must provide item and request details. These include:

- Request Type (call slip or document delivery);
- Request Status (Requested, In Process, In Transit, Waiting for Pickup);
- Request on: (date, i.e. “now”);
- Pickup location (defaults to local branch);
- Not Needed After (date): this is the expiration date;
- Document Delivery Details: (article title, authors, pages, vol/issue/date, chapter);
- Request Note

When the form is completed, click Create new request to proceed:

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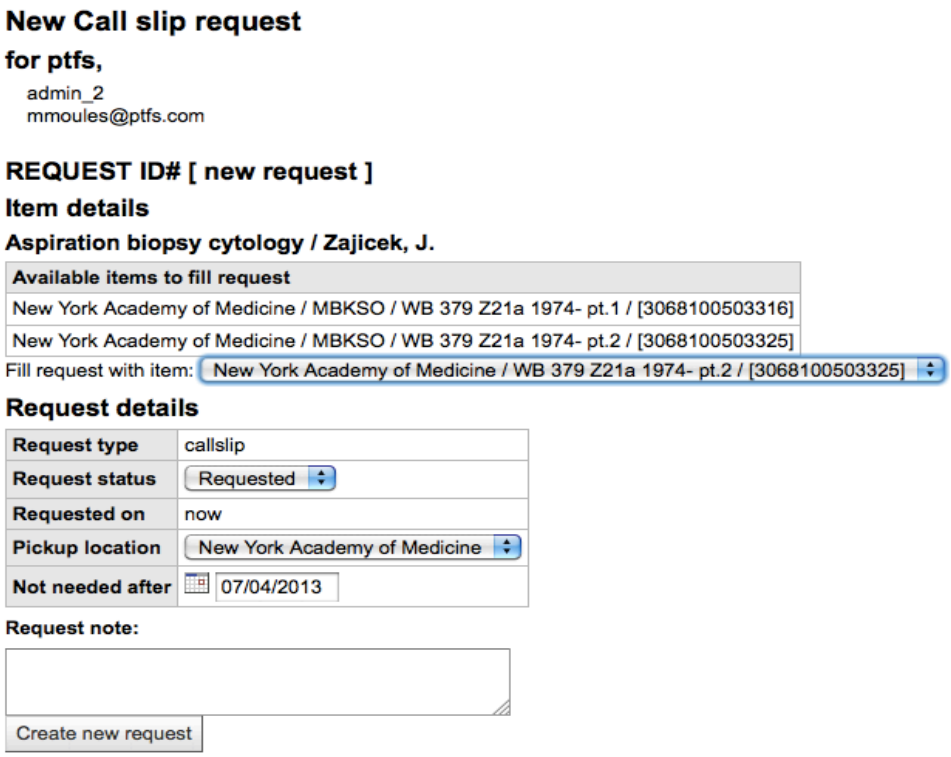
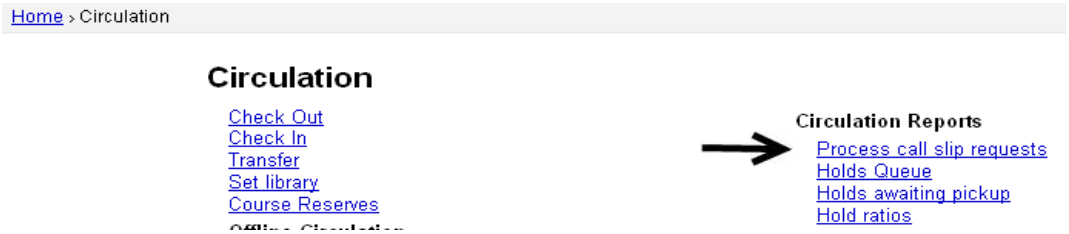

New Call slip request
for ptfs,
admin_2
mmoules@ptfs.com
REQUEST ID# [new request]
Item details
Aspiration biopsy cytology / Zajicek, J.
Available items to fill request
New York Academy of Medicine / MBKSO / WB 379 Z21a 1974- pt.1 / [3068100503316]
New York Academy of Medicine / MBKSO / WB 379 Z21a 1974- pt.2 / [3068100503325]
Fill request with item: New York Academy of Medicine / WB 379 Z21a 1974- pt.2 / [3068100503325]
Request details
Request type
callslip
Request status
Requested
Requested on
now
Pickup location
New York Academy of Medicine
Not needed after
07/04/2013
Request note:
Create new request

A Document Delivery request screen is similar but contains additional fields for specifying pages, journal title, etc.

4.12.2 Managing Requests

To retrieve and manage the submitted requests go to Circulation, Process Call Slip requests.



From here, you can choose the type and status of request that you want to process. For request type, you can select Call Slip, Document Delivery, or Any to see all requests.

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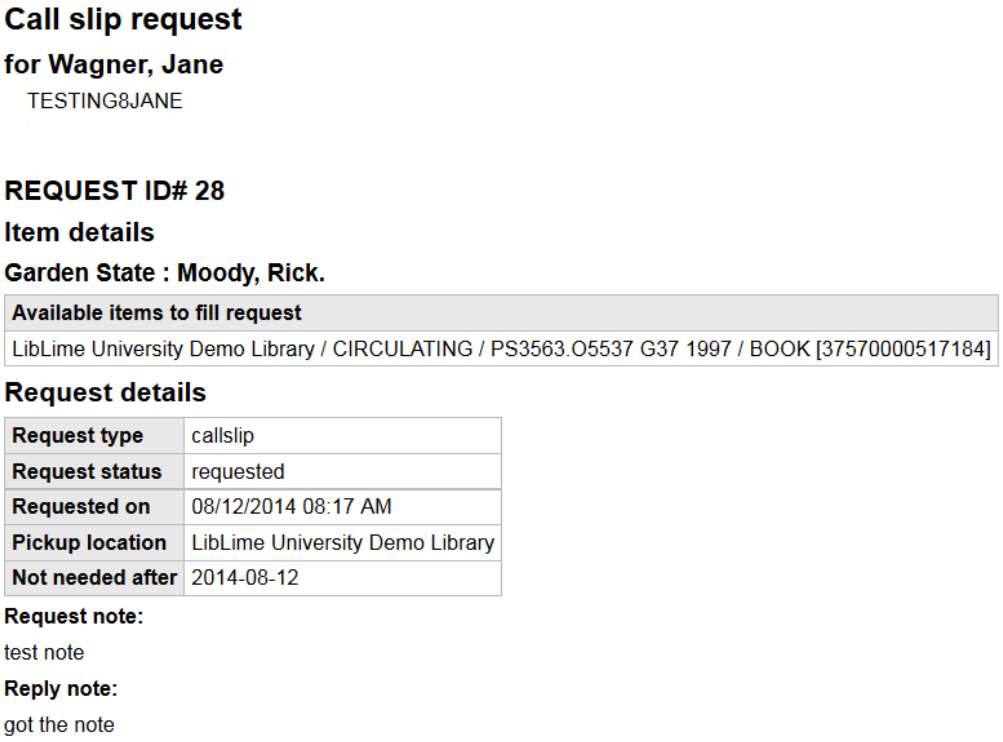
Select the request status, request type, and date (if applicable) and click Update view. The list of current requests for that status is displayed:

The actions available here include:

- Print Slip—this allows you to check the stacks and pull items for the patron. It will open a new browser window so you can print a slip.



- Edit/Fill request—this allows you to comment on the status of the request and/or fill it. If you are going to fill/edit the request you are taken to this screen where you can add a note for the patron and then *Update*, *Fill*, *Refuse* or *Cancel* the request:

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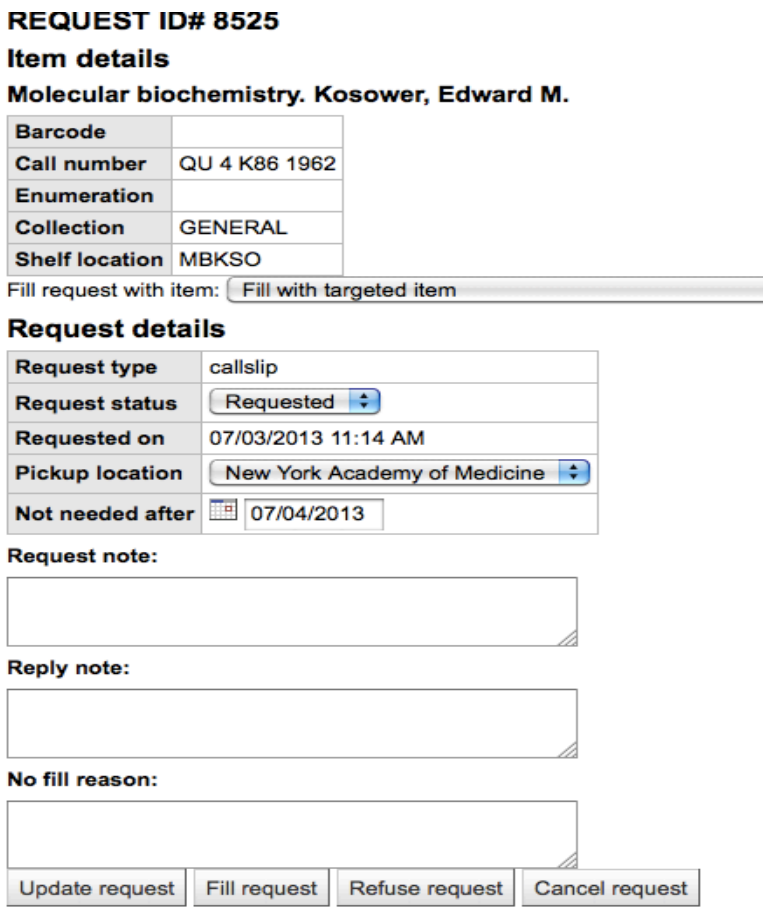

If a comment or note is sent to the patron it will appear in the patron's Discovery Layer account. The Discovery Layer My Requests tab will show the current status of all patron requests:

Call Slip	Judaism.	LibLime University Demo Library	06/20/2014	06/21/2014		completed
Call Slip	Engineers`dictionary	LibLime University Demo Library	12/17/2013	01/31/2014		in_process
Call Slip	United States History :	LibLime University Demo Library	01/16/2014	02/28/2014	testing no-items	in_process Response from library: scanned and sent
Call Slip	The Garden State :	LibLime University Demo Library	12/17/2013	01/10/2014	test call slip	on_hold
Document Delivery	Journal of abnormal psychology.	LibLime University Demo Library	12/17/2013	01/31/2014		requested Cancel
Call Slip	Water /	LibLime University Demo Library	07/09/2014	07/10/2014		requested Cancel Response from library: Will be available in 2 days

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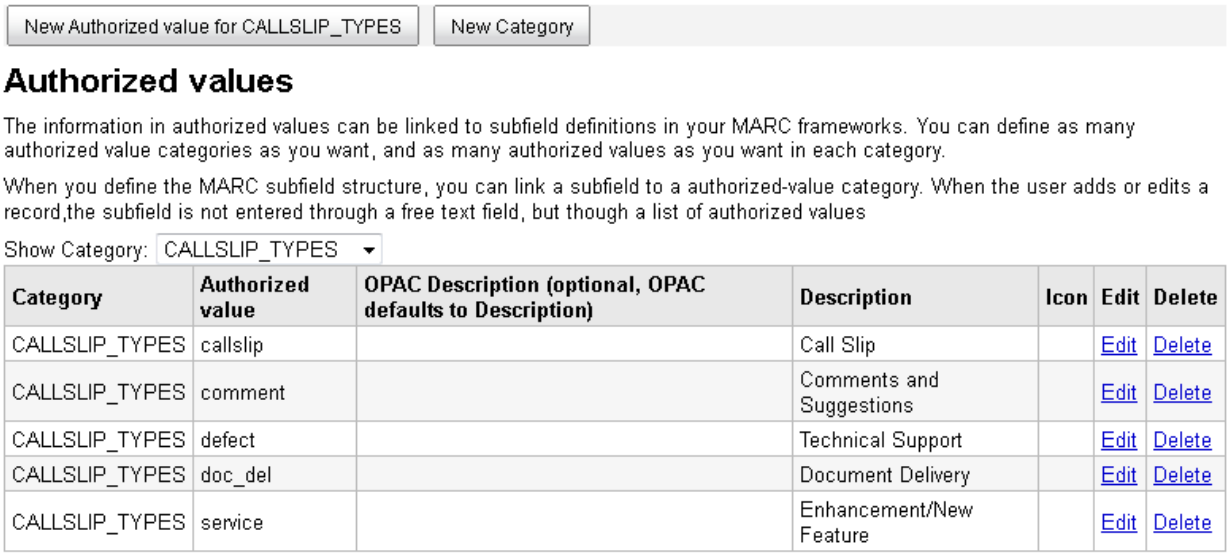
- Cancel request—selecting the Cancel request link allows you cancel the request directly, with no option to provide an explanation for the action to the patron. The request will simply appear as "cancelled."

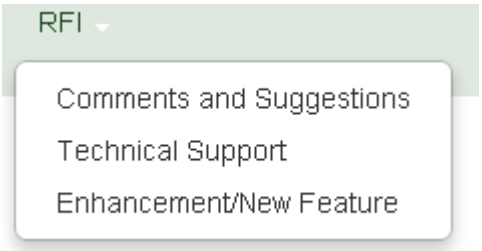
4.12.3 Other Request Forms

Three informational forms have been added; these are Comments and Suggestions, Technical Support, and Enhancement/New Feature. These forms can be relabeled under Administration, Authorized Values, CALLSLIP_TYPES:


New Authorized value for CALLSLIP_TYPES
New Category
Authorized values
The information in authorized values can be linked to subfield definitions in your MARC frameworks. You can define as many authorized value categories as you want, and as many authorized values as you want in each category.
When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user adds or edits a record,the subfield is not entered through a free text field, but though a list of authorized values
Show Category: CALLSLIP_TYPES

Category	Authorized value	OPAC Description (optional, OPAC defaults to Description)	Description	Icon	Edit	Delete
CALLSLIP_TYPES	callslip		Call Slip		Edit	Delete
CALLSLIP_TYPES	comment		Comments and Suggestions		Edit	Delete
CALLSLIP_TYPES	defect		Technical Support		Edit	Delete
CALLSLIP_TYPES	doc_del		Document Delivery		Edit	Delete
CALLSLIP_TYPES	service		Enhancement/New Feature		Edit	Delete

Changing the description will change what displays in the RFI pulldown in the Discovery Layer masthead:



You can hide an informational form by editing it and leaving the Description field blank, or remove its entry from the authorized value altogether (do NOT remove the callslip or doc_del entries). You can also hide the whole RFI section with this entry in the Inline Styles block of the Discovery Layer Configuration Editor (see that manual)

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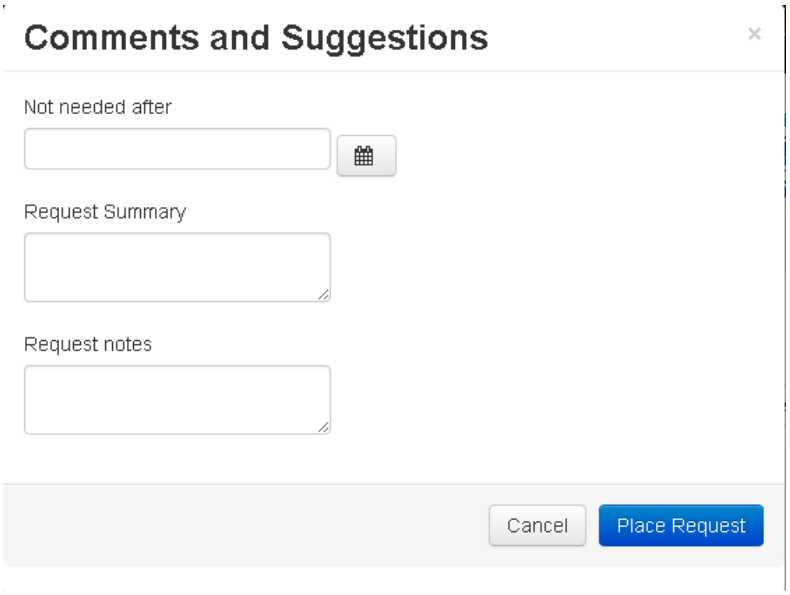
nav li.rfi { display: none; }

However, you cannot add a new form. You are limited to the three delivered forms. All three types produce a request form:



When a user places one of these requests, those requests show in the staff Process Call Slips interface; staff can respond and close requests there.

Call Slip	**State of the unions :** Dine, Philip M.	Jane4 Wagner	requested	10/22/2014 09:14 AM	Print slip Edit/Fill request Cancel request
Call Slip	**State of the unions :** Dine, Philip M.	Jane12 Wagner	requested	10/22/2014 09:22 AM	Print slip Edit/Fill request Cancel request
Comments and Suggestions	**test comment RFI**	Jane4 Wagner	requested	10/22/2014 01:15 PM	Print slip Edit/Fill request Cancel request
Enhancement/New Feature	**test enhancement**	Jane4 Wagner	requested	10/22/2014 01:29 PM	Print slip Edit/Fill request Cancel request
Technical Support	**test Techsupport**	Jane4 Wagner	requested	10/22/2014 01:29 PM	Print slip Edit/Fill request Cancel request

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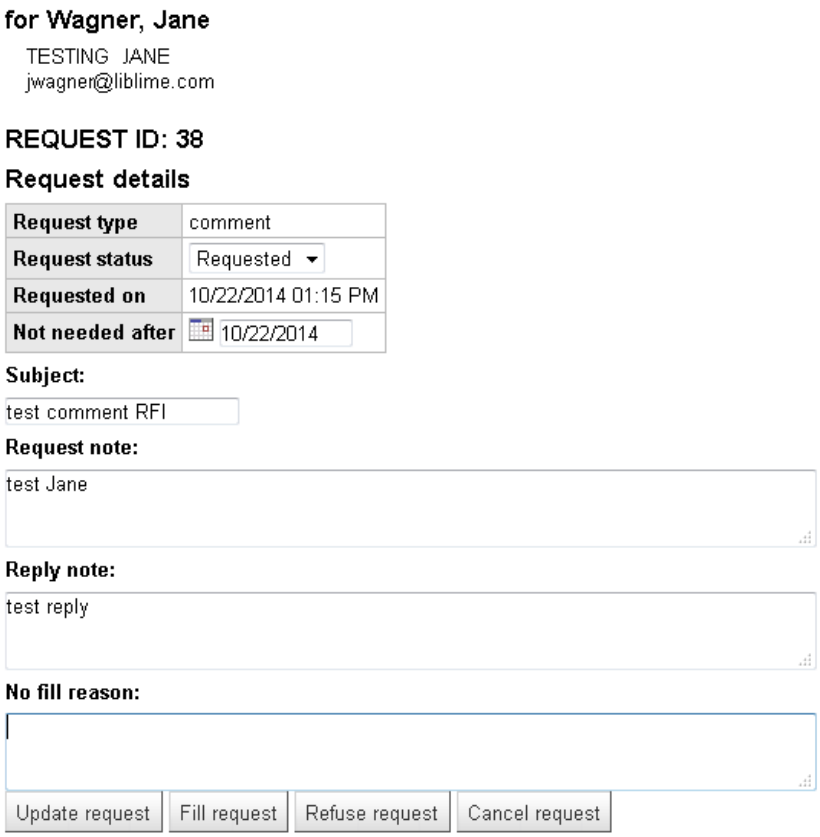
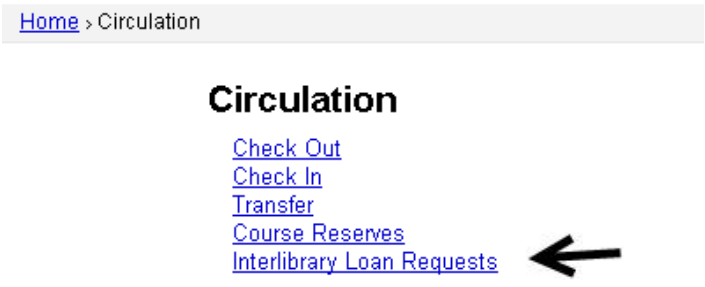


4.13 Interlibrary Loan

Users can place Interlibrary Loan requests through the Discovery Layer (see that section). Staff users can monitor ILL requests under the Circulation module main page:



On that screen, staff will see tabs for pending, approved, rejected, on-order, or available requests. To update status on a request, use the pulldown to select a predefined reason. If you click "others" you can type a reason into the field. Then click the relevant button (Approve, Reject,

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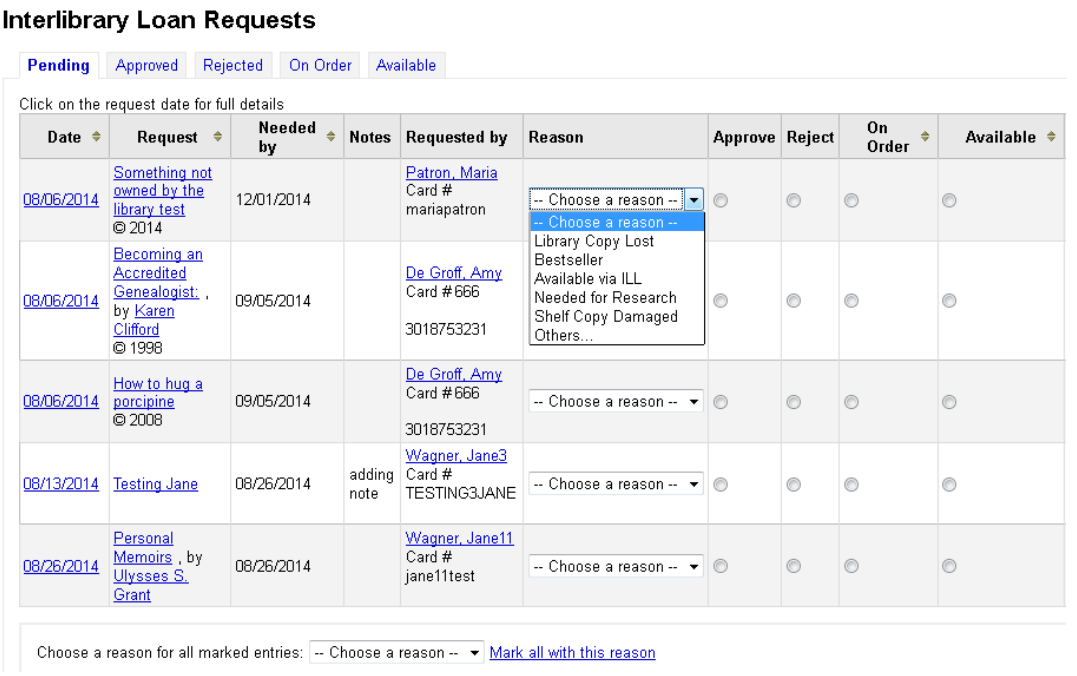
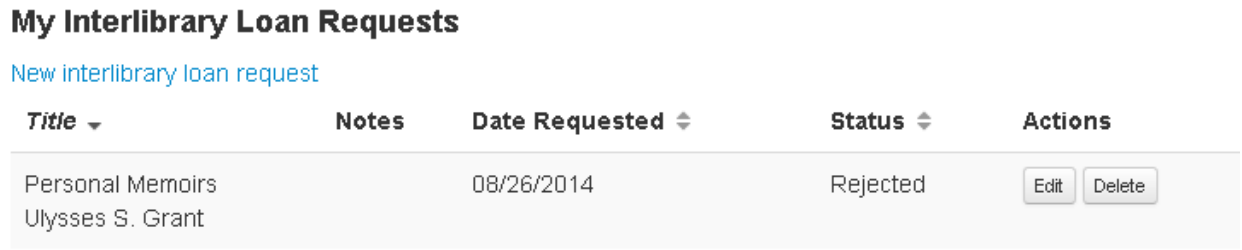
etc.) and click the Change Status button at the bottom of the page. You can select one reason and apply it to all requests on the tab if desired:



Once a pending request has been updated, it moves to the appropriate tab (Rejected, etc.).

The patron will always see the current status of a request in the Discovery Layer; depending on messaging preferences the patron may receive a notice of some kind as well.



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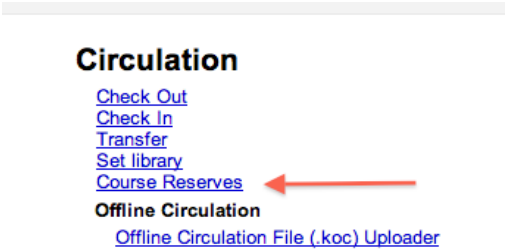
4.14 Course Reserves

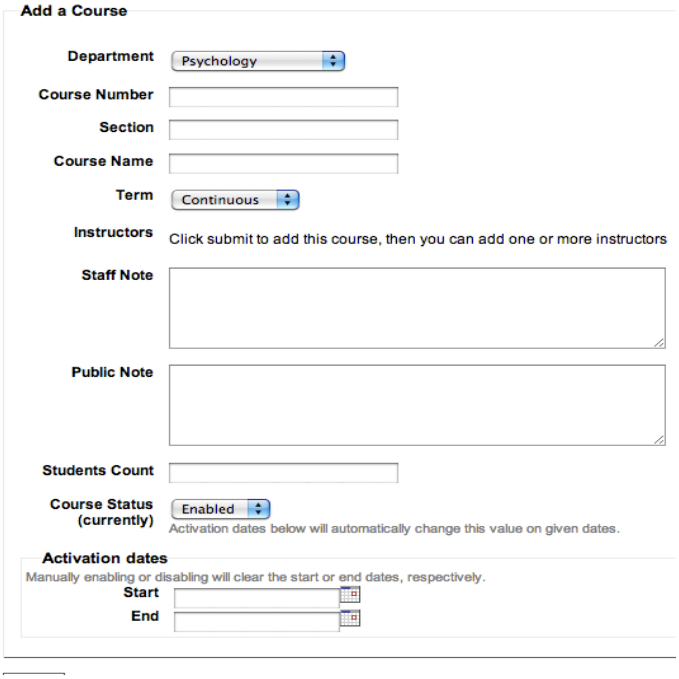
Course Reserves functionality allows staff to group together materials tied to specified courses so they can be checked out for short periods of time (two hours, overnight, etc.). If enabled (syspref CourseReserves), courses and reserve items are visible in staff mode and in the Discovery Layer.

4.14.1 Creating Courses

Courses are created under Circulation, Course Reserves:



Click the **New Course** button to add a course:



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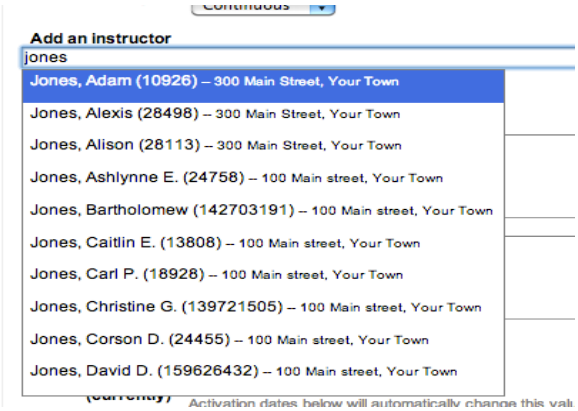
All of the fields are optional except for Course Name.

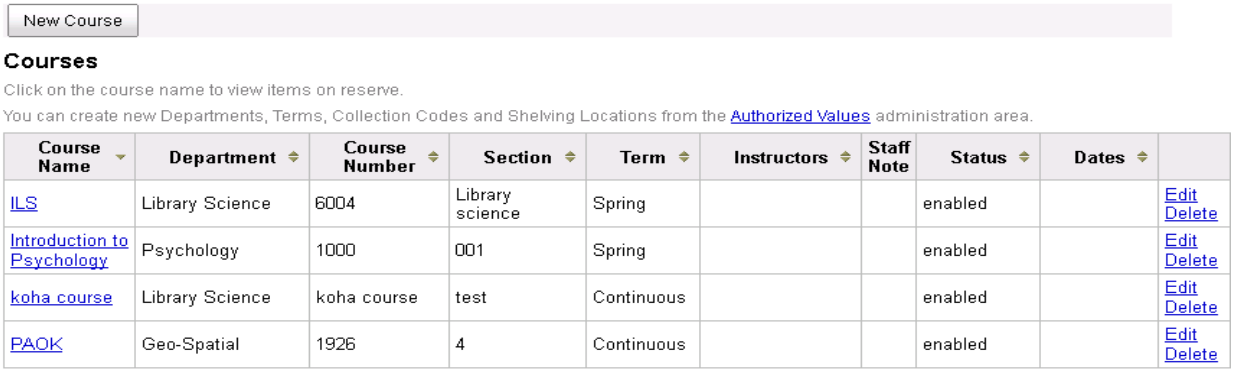
If the course is taught by instructors, click the **Submit** button to save the course and you will be automatically prompted to enter an Instructor's name. Instructors must have DLS patron records. Begin typing the instructor's last name and a list of matches will appear:


Add an instructor
jones
Jones, Adam (10926) – 300 Main Street, Your Town
Jones, Alexis (28498) – 300 Main Street, Your Town
Jones, Alison (28113) – 300 Main Street, Your Town
Jones, Ashlynne E. (24758) – 100 Main street, Your Town
Jones, Bartholomew (142703191) – 100 Main street, Your Town
Jones, Caitlin E. (13808) – 100 Main street, Your Town
Jones, Carl P. (18928) – 100 Main street, Your Town
Jones, Christine G. (139721505) – 100 Main street, Your Town
Jones, Corson D. (24455) – 100 Main street, Your Town
Jones, David D. (159626432) – 100 Main street, Your Town

Click the **Submit** button again to link the Instructor to the Course.

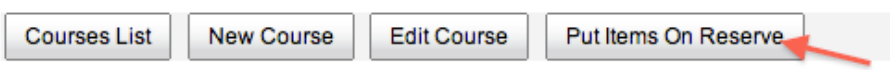
4.14.2 Adding Items to Courses

Once a course has been created, it will display under Circulation, Course Reserves:


New Course
Courses
Click on the course name to view items on reserve.
You can create new Departments, Terms, Collection Codes and Shelving Locations from the Authorized Values administration area.

Course Name	Department	Course Number	Section	Term	Instructors	Staff Note	Status	Dates	
ILS	Library Science	6004	Library science	Spring			enabled		Edit Delete
Introduction to Psychology	Psychology	1000	001	Spring			enabled		Edit Delete
koha course	Library Science	koha course	test	Continuous			enabled		Edit Delete
PAOK	Geo-Spatial	1926	4	Continuous			enabled		Edit Delete

From the list of Courses, clicking on any course name will open the Course. You can then add items to the Course:



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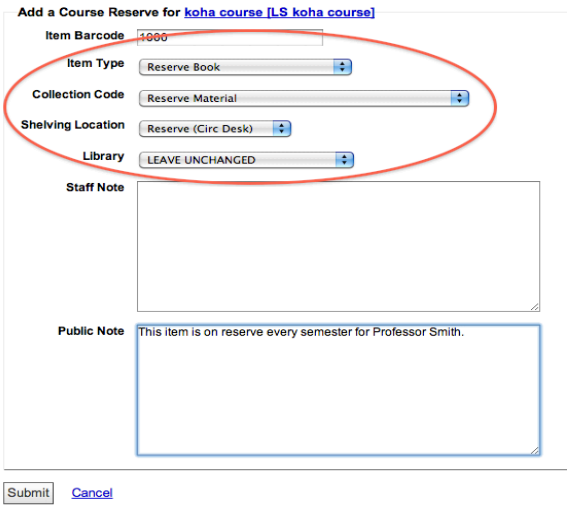
A bibliographic record and item (holdings) record must already exist in the database before it can be put on Reserve. Search for the item to be added by entering its barcode at this screen. If item types, collection codes and shelving locations have been set up for Course Reserve, these are now visible:



Click Submit to save the record. From the list of courses, if you click on a course name, you will see the items that have been linked to that course:

4.14.3 Suspending or Deleting Courses

Materials designated for Course Reserve will retain any temporary item type, collection code and shelving location settings for as long as their corresponding course is Enabled (and will display in the Discovery Layer).

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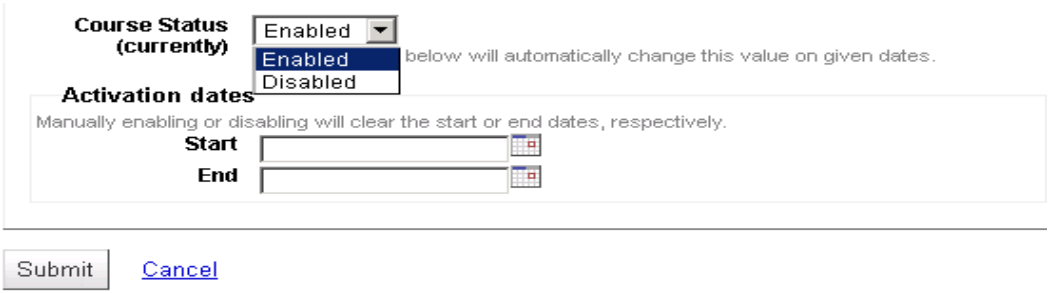
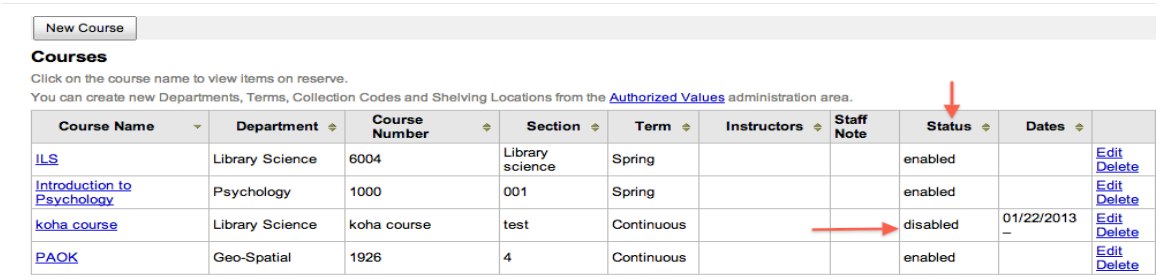
If a course will not be repeated, it can be deleted. NOTE: any items currently checked out will need to be checked in, and all items removed from the courselist, before a course can be deleted. To delete a course, click the Delete link from the main course display page (Circulation, Course Reserves).

If a course is not taught every semester, you may want to keep the course itself, but suspend it. From the main course display page, click the Edit link and scroll down to the bottom of the course setup page. Use the Course Status pull-down to select Disabled:



When the course is created or edited, you can also enter specific start and end dates, which will suspend or unsuspend the course automatically. This requires the cron job manage_coursereserves.pl; your system administrator should make sure it is running.


New Course
Courses
Click on the course name to view items on reserve.
You can create new Departments, Terms, Collection Codes and Shelving Locations from the Authorized Values administration area.

Course Name	Department	Course Number	Section	Term	Instructors	Staff Note	Status	Dates	
ILS	Library Science	6004	Library science	Spring			enabled		Edit Delete
Introduction to Psychology	Psychology	1000	001	Spring			enabled		Edit Delete
koha course	Library Science	koha course	test	Continuous			disabled	01/22/2013 –	Edit Delete
PAOK	Geo-Spatial	1926	4	Continuous			enabled		Edit Delete

The course and its materials still exist, but are inactive and won't show in the Discovery Layer.

4. Patrons

Both library users and library staff must have patron records in the DLS, but those records are configured differently. Staff user records can also be used for borrowing if desired. This section

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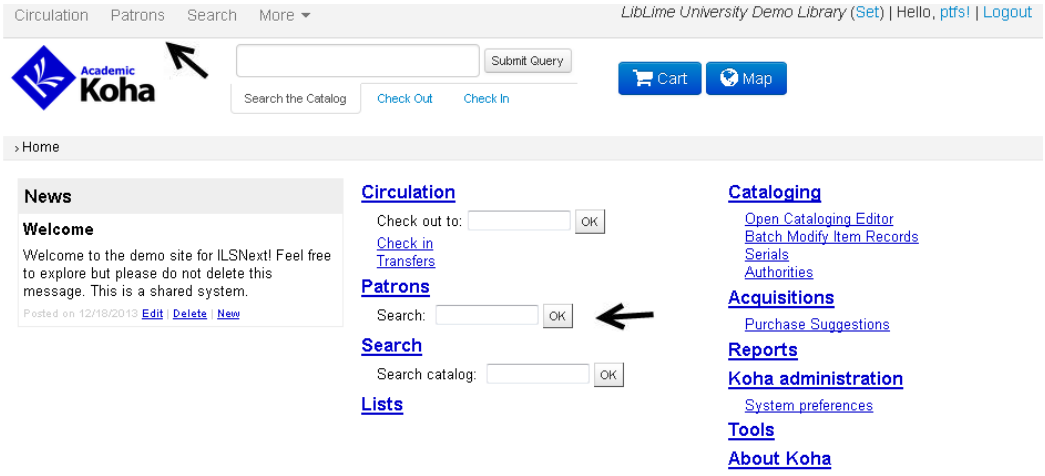
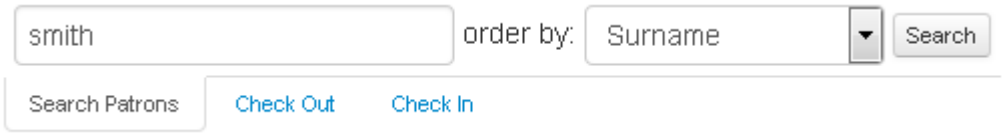
will primarily discuss patron records; see the next section for staff and patron permissions, messaging options, and Role (default) settings.

5.1 Searching for Patrons

A patron search is the first step in a checkout, and you can get to a patron record that way. In addition, though, you can bypass the circulation menus and search directly for a patron record. From the initial menu, you can click the Patrons link in the top menu bar, or enter a name or cardnumber in the search box under Patrons and click OK.



If you click the top menu bar link, or the Patrons link (without searching), you'll be taken to the main Patrons screen. At the top will be a search box.



You can search on partial/full name or cardnumber (patron barcode) in this search box or the search box on the main page. You can also browse by last name (click on a letter to move to that point). You can truncate the search using an asterisk (*) – for example, Smit* to find all names beginning with that string, or *smith to find all names ending with that string. From any search/browse, you'll get a results list.

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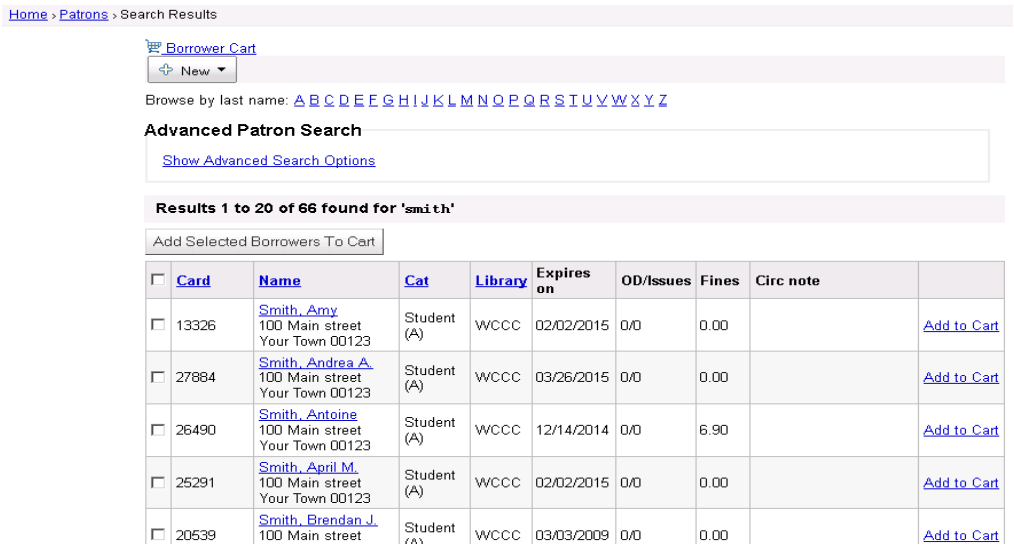

If there is more than one screen of results, there will be links at the bottom of the screen to page through the results. Click on the name you want, and you'll be taken into the patron record Details tab.

5.1.1 Advanced Patron Searching

If you need to search on other data than name and cardnumber, click the Show Advanced Search Options link. Almost every field in the patron record is searchable using this feature. You can search one data field or multiple fields at the same time. Use this feature to search for unique identifiers in the patron record, such as phone number or email address.

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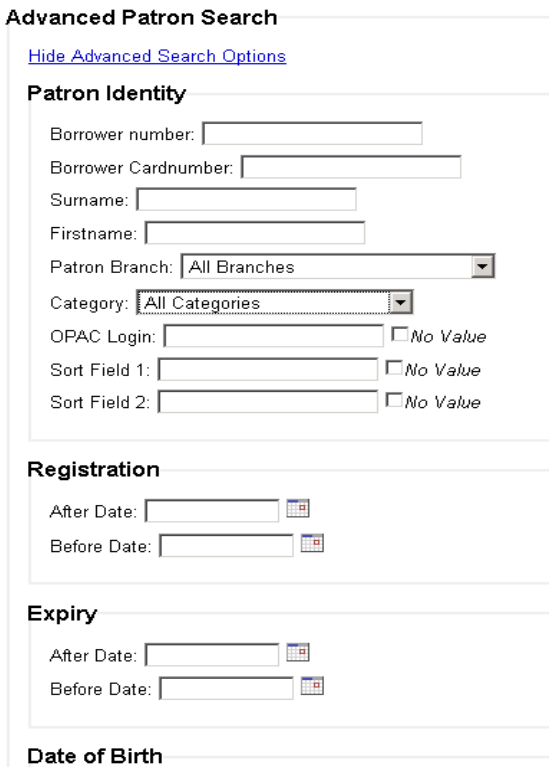
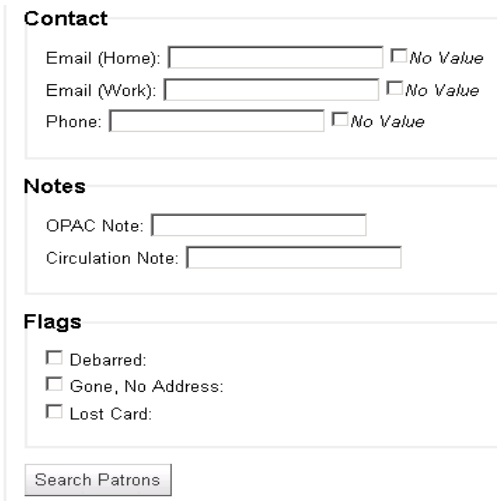


You could search for all patrons with a particular patron category, or patrons with no login ID, or patrons with a particular city, or patrons with no email address, or patrons who have been debarred. You could also combine a search, such as patrons with Child-type categories whose date of birth is before a specified date.



After making your selections, click the Search Patrons button and you'll get a results list.

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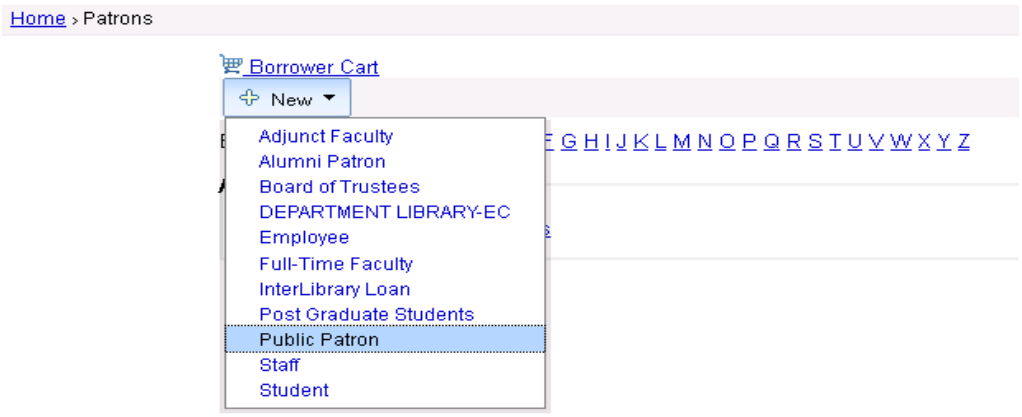
5.2 Creating a Patron

Always search for the patron before creating a new record; you don't want duplicates in your system. To create a library user patron record, go to Patrons and click New. A list of the configured patron categories will display; select the appropriate one.



Patron categories have been established by your system administrator based on your site's needs (see Administration, Patron Categories). Most patron categories will be either adult or child; library staff must use a category defined as staff.

You are then taken into an edit screen, and can start entering information. Your library may not use many of the fields. The ones that must be completed are name, cardnumber, and email. Without an email address, notices cannot be sent. You may want to include the patron's mailing address or other fields on notices; fill out whatever fields your library policy requires. The Initials field is used for middle initials or middle names.

Some of the fields are only relevant to specialized or international libraries. There are also sections for alternative addresses, such as student local and permanent address. The system administrator may hide fields as needed to make it easier for library staff to identify and enter the needed field data. During your implementation, your system administrator will have identified needed fields – follow the policies and usage set by your site. Some fields may be set in the system configuration as required; you won't be able to save the record without entering them (see the BorrowerMandatoryField syspref).

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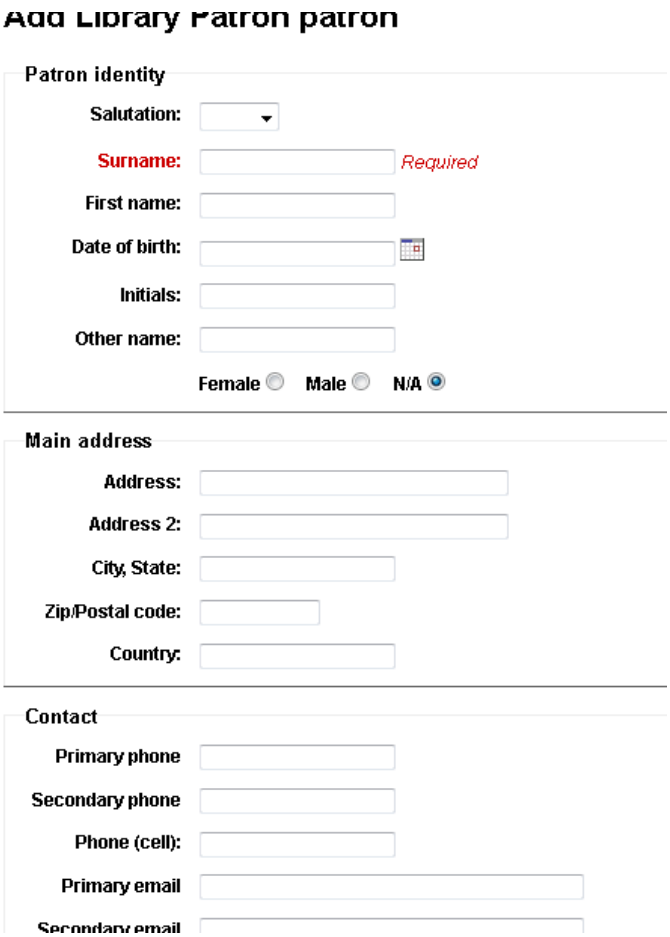

In the contact area, you have entries for multiple phone and email addresses. Use the Primary email field for the primary email address. This is the field that will be used for notices unless your system is configured differently (syspref AutoEmailPrimaryAddress). Along the same lines, use the primary phone field for the best contact number. In businesses and organizations, that may be the person's work number. In public libraries, it may be the home number. (In earlier versions, these fields were actually labeled as "home" and "work" – primary and secondary are better descriptions of the function.)

The only field here used automatically by the DLS is the primary email address; the other fields are informational for library staff but may be included on notices and reports.

Be aware that the DLS stores the city and state in one field (the city field). Enter data as, for example,

Bethesda, MD

in that field. There is a separate field for zip code.

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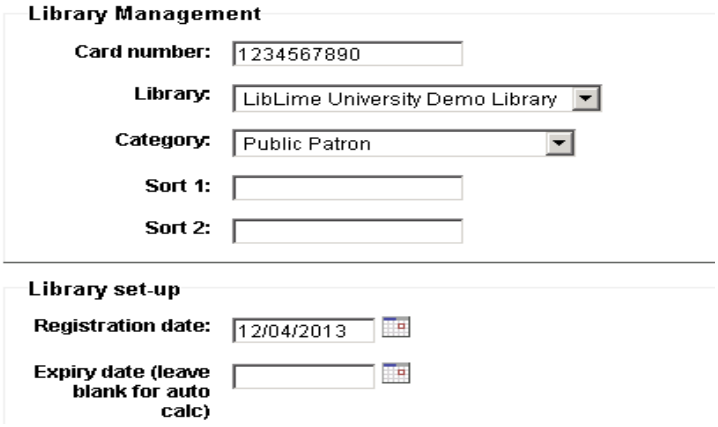
Scrolling down further, under the Library Management section, make sure you enter a cardnumber (patron barcode). Your system might be configured to create one automatically (syspref autoMemberNum); if not, scan the barcode being assigned to the user, or type one. The cardnumber MUST be unique.



In this section, you can also change the patron category and the home library if needed. The system will pick up the current date as the enrollment date. The patron category policy has a defined enrollment period; if you leave the Expiry Date field blank, the system will calculate the expiration date based on that period. You can enter a manual date if you need a shorter or longer enrollment period for this patron.

There are two note fields in the record. OPAC Note is for messages that will be visible to the patron when logged into the Discovery Layer. It can be a useful way to communicate something that isn't urgent or isn't covered by one of the standard messaging options. Circulation Note is for messages that will display to staff on the Checkout screen. This can be used for warnings, reminders, or other information needed at checkout.

OPAC note:
This message appears on this patron's user page in the OPAC
Circulation note:
This message displays when checking out to this patron

The OPAC login section is needed if you want your patrons to be able to log into the Discovery Layer. Common practice is for the login ID to be the same as the cardnumber, since the login ID field must also be unique. **NOTE: a user can log in either with the defined userid (OPAC**

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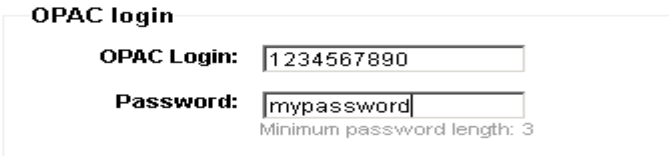
Login field) or the cardnumber – if the value entered does not match the OPAC Login, it will try to match against a cardnumber.



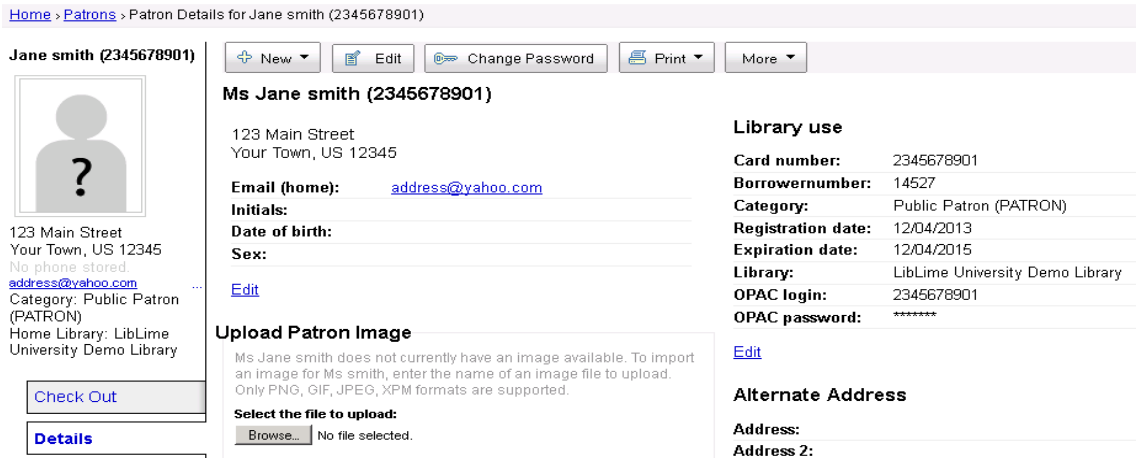
When you create a patron, you will see the password as you type it in. The password is then stored in encrypted form and you will never be able to read it again. You can change it, but you can't tell a patron what it is. The patron can change passwords in the Discovery Layer, so you may set a rather generic initial password (such as last name) when you first create the account.

Two sections in the patron record, User Roles and Patron Messaging Preferences, will be covered in detail in the next sections.

When you have entered all the needed information, scroll to the bottom and click Save. The system will do some integrity checking. If you've tried to use a cardnumber already assigned to someone else, for example, you'll get a warning.

Home › Patrons › Add Adult patron smith Jane
Add Adult patron Jane smith
The following fields are wrong. Please fix them.
Cardnumber already in use.

Fix the problem and click Save again. When the record is saved, you'll be taken into the main patron details screen. Notice that the expiration date has been added.



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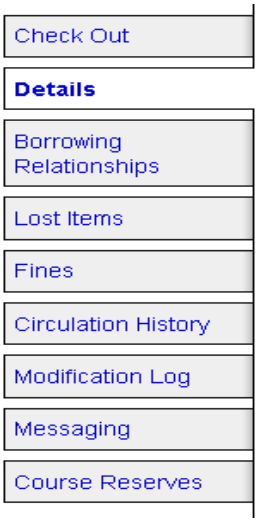
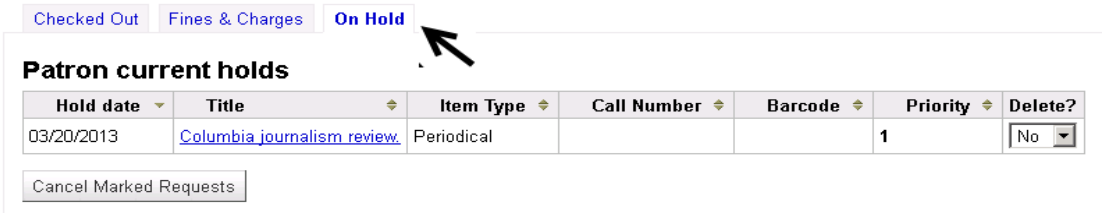
From this screen you can use the side tabs to move to other functions for this patron (check out, fines, etc.).



If you scroll to the bottom of the page, there are tabs with information on current checkouts, fines, and holds.



You can take actions on the various side or bottom tabs as needed (check out or renew items, cancel holds, pay fines, etc.).

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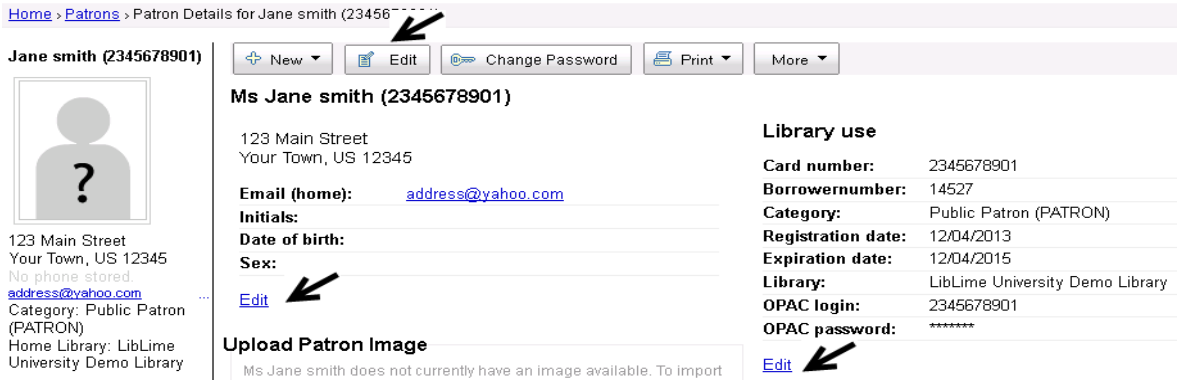
5.3 Editing a Patron

From a patron Details display screen, you can edit the entire record, or segments of it. For the entire record, click the Edit button on the toolbar. For just one segment, click the text Edit link below that display.



You will be taken into a full or partial edit screen; the same display as for creating a patron. Make your changes and click Save.

5.4 Changing Passwords for Patrons

Patrons can change their own passwords through the Discovery Layer (if configured), but staff can also change passwords for patrons. In the patron Details screen, you can either edit the full record and scroll down to the OPAC Login section, or just click the Change Password button on the toolbar.

Using the Change Password button opens an edit screen where you can change either/both the user login ID and password.

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The existing password is stored as encrypted text, so what you see in the New Password box is not the real password. As you type a new password, it will be plain text and visible. Once you click Save, it will be encrypted. Passwords are case sensitive.

5.5 Messages

Patrons are not given an option about getting overdue notices; those are set in the system configuration. For all other types of notices, patrons can opt in or out of notification. Library staff can set defaults or edit an individual patron's settings. There are many delivery methods possible, including email, pop-up, list (in the Discovery Layer) and RSS feed. See the separate Messaging Options section for more information about types of messages and about setting defaults.

Library staff can see a record of notices sent to a patron by clicking the Messaging tab on the left side of the patron display screen.

Message Queue (most recent messages)

Endpoint	Message Type	Subject	Delivered	Created
email	recall	Item Recall Notice		2014-08-11 10:50:53
popup	gen.misc	General message	2014-08-11 22:25:29	2014-08-11 22:25:26
list	gen.misc	General message	2014-08-15 12:51:03	2014-08-11 22:25:26
popup	gen.misc	General message	2014-08-15 12:59:45	2014-08-15 12:59:40
list	gen.misc	General message		2014-08-15 12:59:40

Patrons can see their messages in the Discovery Layer by clicking the My Messages tab in their account section.

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Staff can also monitor all notices by creating a SQL report to watch the message table. This report will show the most recent notices first, with details about date/time and status.

```
SELECT message_endpoints.message_endpoint_type, message_types.code,
message_types.description, messages.created_time,
message_endpoints.delivered_time, message_endpoints.delivery_status,
borrowers.cardnumber, borrowers.surname, borrowers.firstname,
message_endpoints.title, message_endpoints.content from message_endpoints
INNER JOIN borrowers on (message_endpoints.user_id =
borrowers.borrowernumber) INNER JOIN messages ON (messages.id =
message_endpoints.message_id) INNER JOIN message_types on
(messages.message_type_id = message_types.id) order by messages.created_time
desc
```

This will show all types of messages; if you want to limit to a particular type, such as email, add a WHERE limiter before the “order by” section:

```
WHERE message_endpoint_type = 'email'
```

This report is useful to confirm that messages are being generated, or to verify that a particular patron received a notice (add a WHERE borrowernumber limiter if needed).

5.6 Importing Patrons

Many organizations need to batch-load patrons with data from a central database such as a registrar’s office. If you have permission, you can do this under Tools, Import Patrons. You will need to create a .csv file with the borrower table fields. You can download a sample .csv file from the tool.

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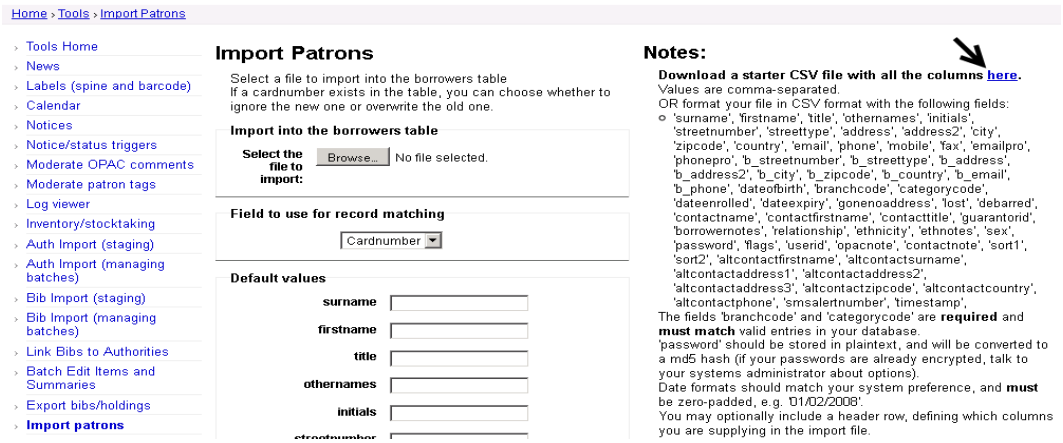
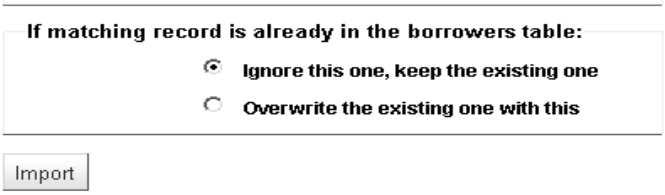

Home › Tools › Import Patrons
Tools Home
News
Labels (spine and barcode)
Calendar
Notices
Notice/status triggers
Moderate OPAC comments
Moderate patron tags
Log viewer
Inventory/stocktaking
Auth Import (staging)
Auth Import (managing batches)
Bib Import (staging)
Bib Import (managing batches)
Link Bibs to Authorities
Batch Edit Items and Summaries
Export bibs/holdings
Import patrons
Import Patrons
Select a file to import into the borrowers table.
If a cardnumber exists in the table, you can choose whether to ignore the new one or overwrite the old one.
Import into the borrowers table
Select the file to import:
Browse...
No file selected.
Field to use for record matching
Cardnumber
Default values
surname
firstname
title
othernames
initials
Notes:
Download a starter CSV file with all the columns here.
Values are comma-separated.
OR format your file in CSV format with the following fields:
'surname', 'firstname', 'title', 'othernames', 'initials', 'streetnumber', 'streettype', 'address', 'address2', 'city', 'zipcode', 'country', 'email', 'phone', 'mobile', 'fax', 'emailpro', 'phonepro', 'b_streetnumber', 'b_streettype', 'b_address', 'b_address2', 'b_city', 'b_zipcode', 'b_country', 'b_email', 'b_phone', 'dateofbirth', 'branchcode', 'categorycode', 'dateenrolled', 'dateexpiry', 'gonenoaddress', 'lost', 'debarred', 'contactname', 'contactfirstname', 'contacttitle', 'guarantorid', 'borrowernotes', 'relationship', 'ethnicity', 'ethnotes', 'sex', 'password', 'flags', 'userid', 'opacnote', 'contactnote', 'sort1', 'sort2', 'altcontactfirstname', 'altcontactsurname', 'altcontactaddress1', 'altcontactaddress2', 'altcontactaddress3', 'altcontactzipcode', 'altcontactcountry', 'altcontactphone', 'smsalertnumber', 'timestamp',
The fields 'branchcode' and 'categorycode' are required and must match valid entries in your database.
'password' should be stored in plaintext, and will be converted to a md5 hash (if your passwords are already encrypted, talk to your systems administrator about options).
Date formats should match your system preference, and must be zero-padded, e.g. '01/02/2008'.
You may optionally include a header row, defining which columns you are supplying in the import file.

The program works by trying to match on existing records using the patron cardnumber or (in some cases) a unique patron attribute. If a match is found, the import process specifies whether to overwrite the existing record with the new one, or to ignore the new one and keep the existing record.


If matching record is already in the borrowers table:
Ignore this one, keep the existing one
Overwrite the existing one with this
Import

You can also fill in default values for various fields; these will be used for every record in the import.

Be aware that if a field exists in the .csv file, it will automatically overwrite that field in the existing patron record, even if the incoming field is empty. For example, if you include the login ID and password fields (userid, password), but don't supply a value, those fields will be wiped. For this reason, ONLY include in the .csv file the fields you want to update, plus the required fields of surname, branchcode, and categorycode (the patron's last name, home library code, and patron category code). Any import must include those three fields, and you must use the policy code rather than the description. For example, if your patron category code is FAC and the description is Faculty, use FAC in the import file. **Policy codes are case sensitive** – you must enter the code exactly as it was created.

As an example, if you want to change the patron expiration date for a group of patrons, you would include the cardnumber field (for matching) and the dateexpiry field with the new date, plus the surname, branchcode, and categorycode fields. Eliminate all other columns/fields from your .csv file. The order of the fields is not important, but your data and headers must be in the same order throughout.

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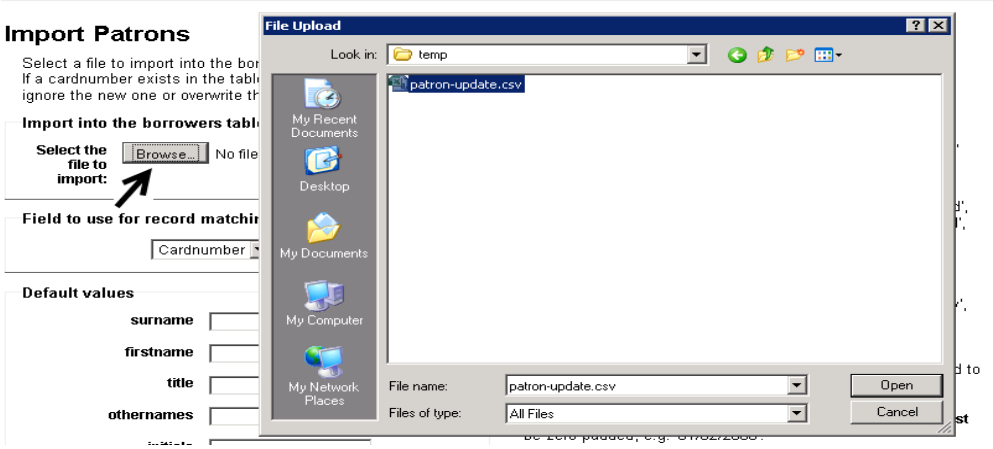
You must enter all dates in the form of YYYY-MM-DD. The screen may display them differently, but the underlying table needs them in this format. A .csv file for this purpose might look something like this:

```
cardnumber,dateexpiry,surname,branchcode,categorycode
20539,2015-08-01,Smith,MAIN,STUDENT
22991,2015-08-01,Smith,MAIN,STUDENT
209424971,2015-08-01,Smith,MAIN,STUDENT
```

Do NOT put spaces between the comma-separated fields. If a field contains a space or a comma (like city, state), you must surround that field with quotation marks. When your .csv file is ready, click Browse in the tool and navigate to your file. Select it and click Open in the pop-up:



That puts the filename into the tool:

Import Patrons
Select a file to import into the borrowers table
If a cardnumber exists in the table, you can choose whether to ignore the new one or overwrite the old one.
Import into the borrowers table
Select the file to import:
Browse...
patron-update.csv

Then make sure your other settings are what you want, and click Import at the bottom of the screen:

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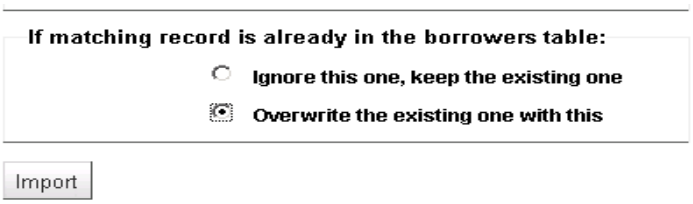
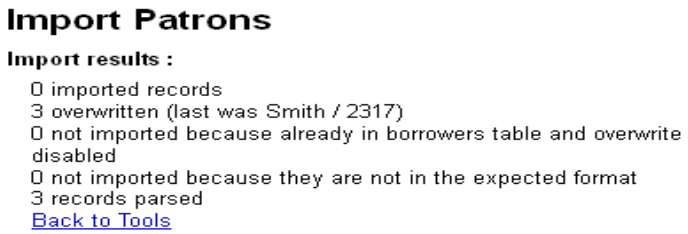

If matching record is already in the borrowers table:
Ignore this one, keep the existing one
Overwrite the existing one with this
Import

The system will process the import file and give you a summary results screen.


Import Patrons
Import results :
0 imported records
3 overwritten (last was Smith / 2317)
0 not imported because already in borrowers table and overwrite disabled
0 not imported because they are not in the expected format
3 records parsed
Back to Tools

5.7 Upload Patron Images

If configured (syspref patronimages), the DLS can display a picture of the patron in staff mode. This is primarily used in school and public library settings, but may be helpful in special libraries as well. The image file should be no larger than 520K, and the recommended size of the image is about 200x300 pixels.

There are two ways to load a patron image, individually in the patron record, or as a batch.

5.7.1 Loading an Individual Image From the Patron Record

In the patron Details screen, you can click the Browse button in the patron image section to locate an image file.

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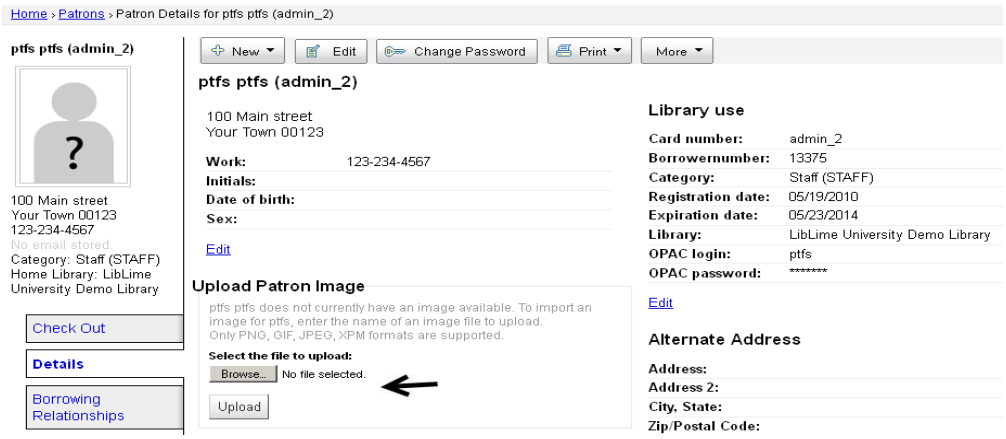
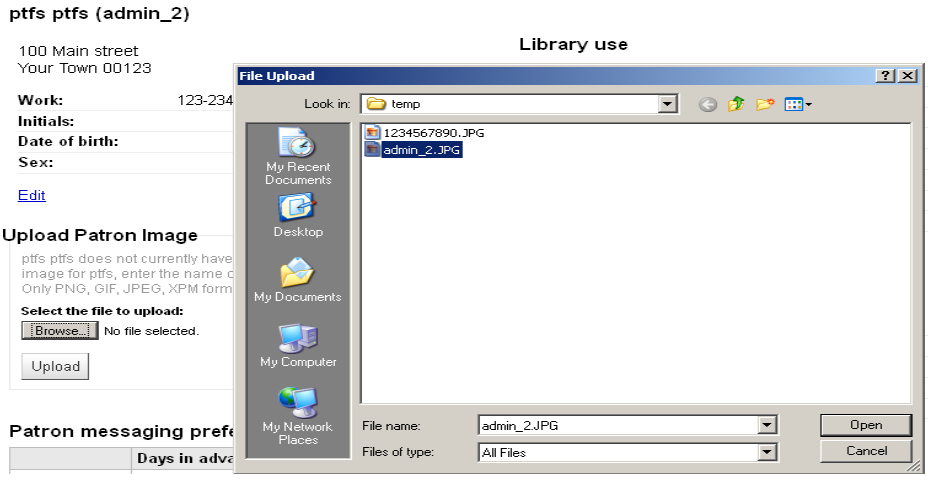
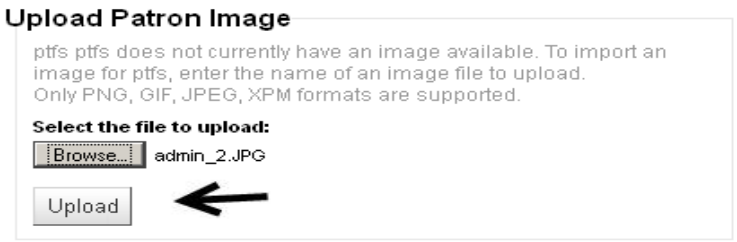


Then browse to the file on your computer and select it:



When the file name appears on the screen, click the Upload button:


Upload Patron Image
ptfs ptfs does not currently have an image available. To import an image for ptfs, enter the name of an image file to upload.
Only PNG, GIF, JPEG, XPM formats are supported.
Select the file to upload:
Browse...
admin_2.JPG
Upload

The image now appears in the screen display, and a Delete link appears in the Patron Image section. You would use that link to remove a picture.

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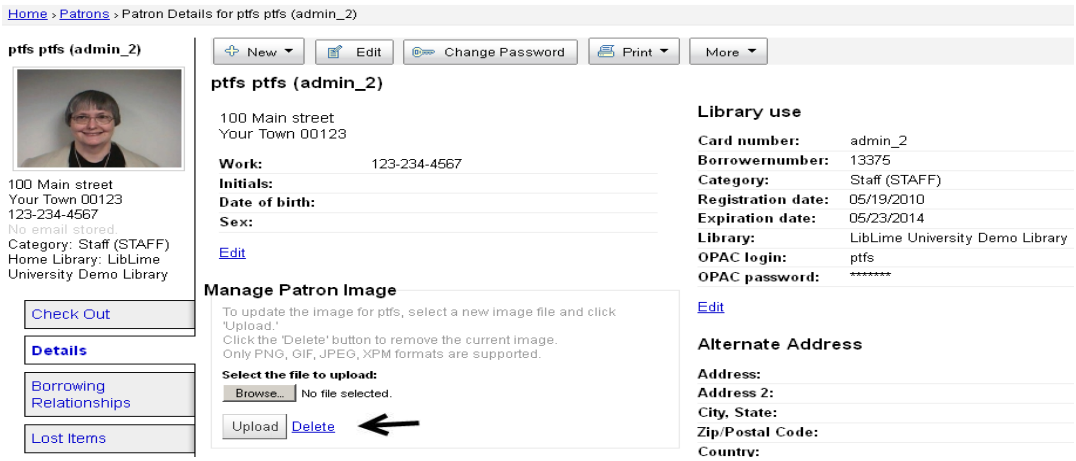
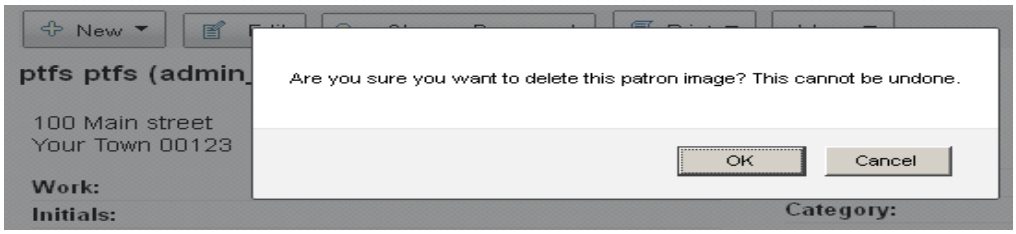


The Delete command uses a pop-up window to warn you the action cannot be undone; if you click OK to proceed, the image file is removed.



5.7.2 Loading a Batch of Images or an Individual Image

You can also load a batch of images at once. For this feature, you will need to provide a link between the image file name and the patron's cardnumber. The simplest way is to name the image with the cardnumber. In the directory with your images, create a text file named either DATALINK.TXT or IDLINK.TXT. In that file (one entry per line), enter the patron cardnumber followed by either a comma or a tab, then the image file name. For example:

admin_2,admin_2.JPG
1234567890,1234567890.JPG

When you have matched all the image files with patron cardnumbers, save the text file. Then create a .zip file containing all the images plus your text file. In Tools, Upload Patron Images, make sure the zip file radio button is clicked. Then click the Browse button and locate your .zip file; click Open to select it.

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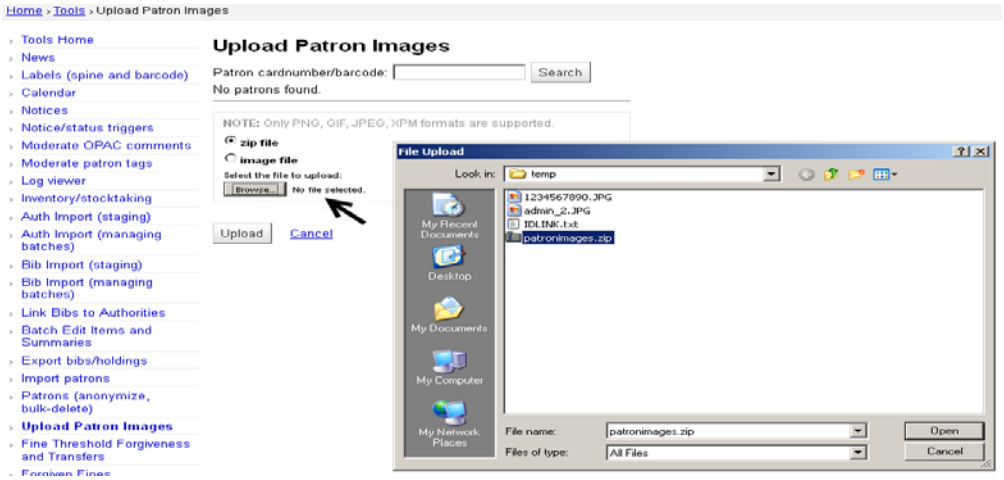

Then click the Upload button. The system will unpack the .zip file, match the images and cardnumbers, and give you a report on the process.

Patron Image(s) Successfully Uploaded
Unpacking completed
1 directorie(s) scanned.
1 directorie(s) processed.
2 image(s) moved into the database:
admin_2.JPG - Cardnumber: admin_2 imported successfully.
1234567890.JPG - Cardnumber: 1234567890 imported successfully.
Upload More Images
Return to Tools

Be aware that if your upload file contains a cardnumber that is not in the DLS patron table, the import will stop at that point. It will show an error and the rest of the images will not load.

Note that you can also load individual images through this tool rather than in the patron record. To do so, select the Image File radio button. You can either search for and select the patron barcode in the top field, or just enter it in the bottom section. Then click Browse to locate your image file, select it, and click Open.

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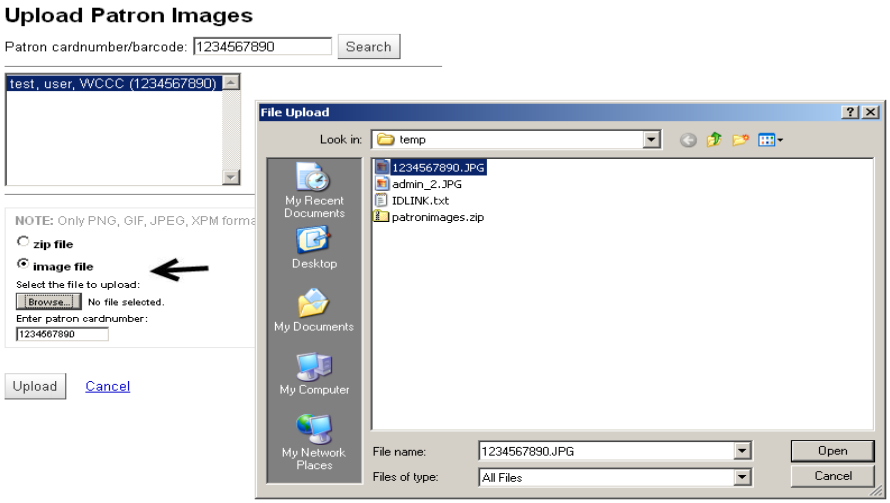

Then click the Upload button and the image file will load:

Return to Patron Detail

Images loaded through the tool cannot be deleted as a batch, but can be deleted individually, through the link in the patron record.

5.8 Linking Parent and Child Records

Libraries which have age restrictions on borrowing usually will create Child patron categories. Staff want to be able to link a child to a parent record, so that the responsible adult is easily identifiable. This can be done through settings in a Child-category patron record.

First, search for and identify the parent record; copy its barcode.

☐	60487312343	Austen, Jane Prejudice Court Prideville V5T 3Z5	Resident (A)	MAIN	02/09/2015	2/2	0.00		Add to Cart	Edit

Then search for the first child record and edit it.

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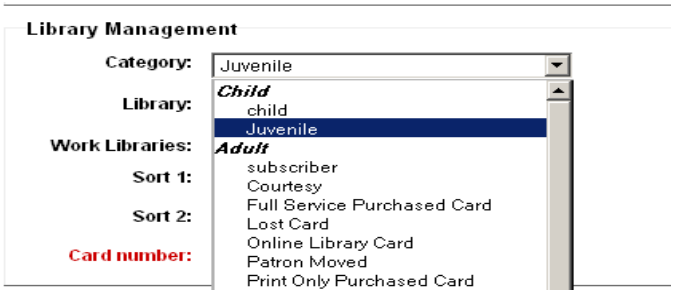
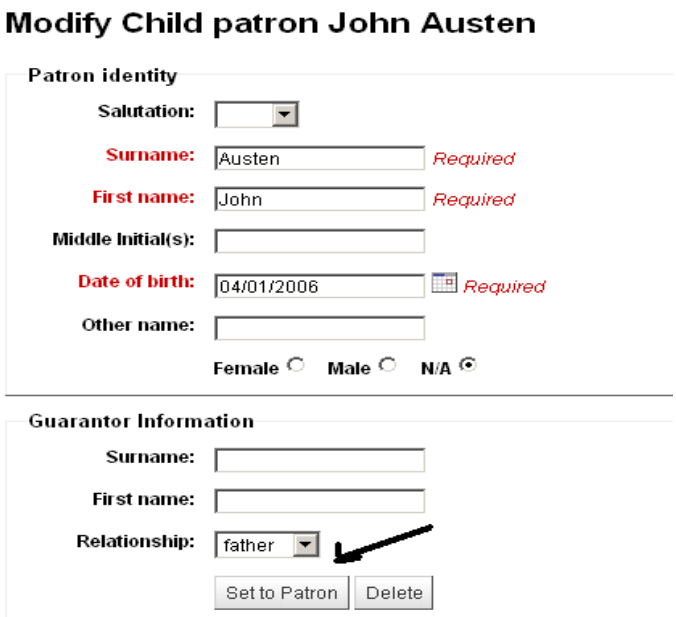
☐	CHILDTEST	Austen, John 123 Hometown Dvire Anytown, TX 12345	Juvenile (C)	MAIN	04/22/2014	0/0	0.00		Add to Cart	Edit

If needed, scroll down to the Library Management section and change the patron category to an appropriate child patron category:



If needed, save the patron record, then edit it again. Near the top of the edit screen there will now be a section for Guarantor information:



Click the Set to Patron button. This brings up a search pop-up window; paste the parent's barcode into the search box:

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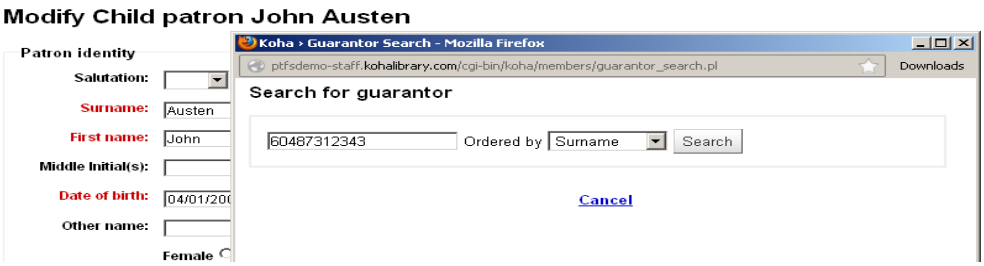
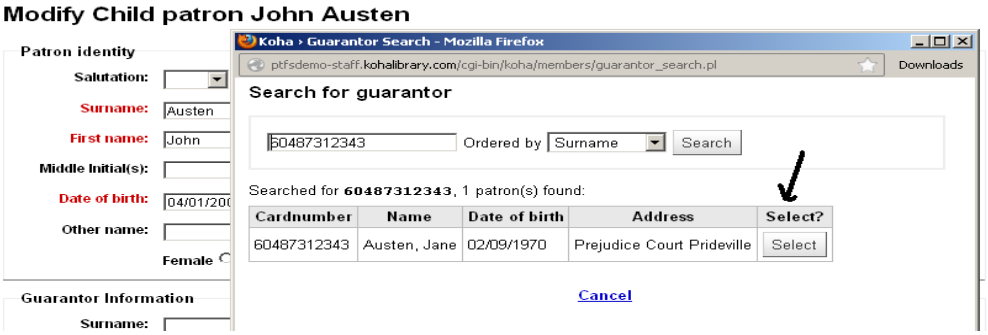
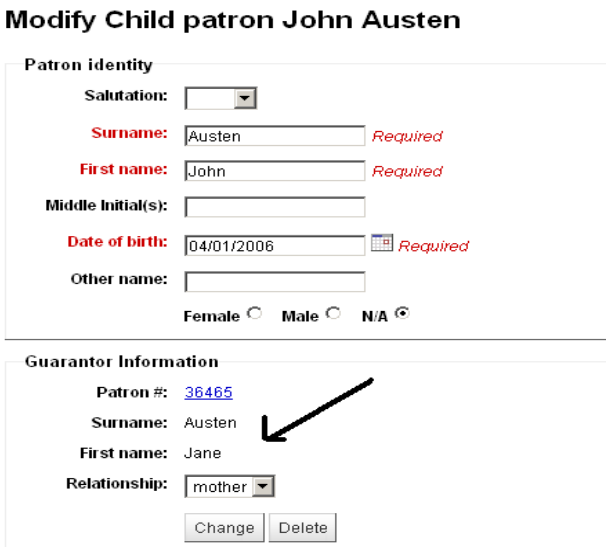


Click the Search button. The window brings up a results list:



Click the Select button next to the parent's name. Then close the pop-up window. That links this child record to the parent record:



Change the Relationship pull-down as needed (father, mother). You MUST save the child's patron record to retain the change. After saving, the link is visible in the display for both child and parent:

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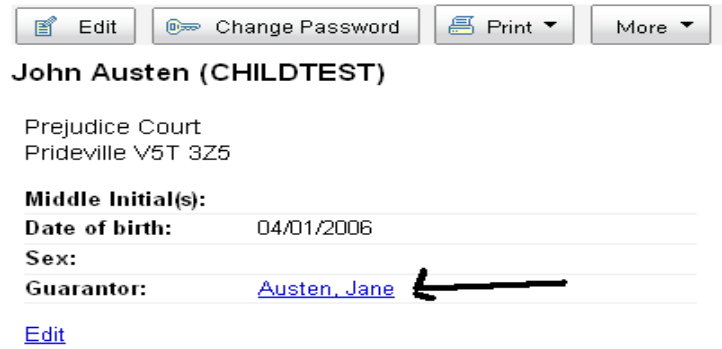

5.9 Updating Child to Adult Patron

The Child patron category includes a setting for upper age limit. This would be the age at which the juvenile would be considered an adult. There is presently no automatic way to promote patrons as they age into a new category. You can do so manually in the patron record. If you have entered the birthdate, and if the patron is now old enough to match the patron category setting, you can go into the patron Details screen. Click the More button, then select Update Child to Adult Patron.

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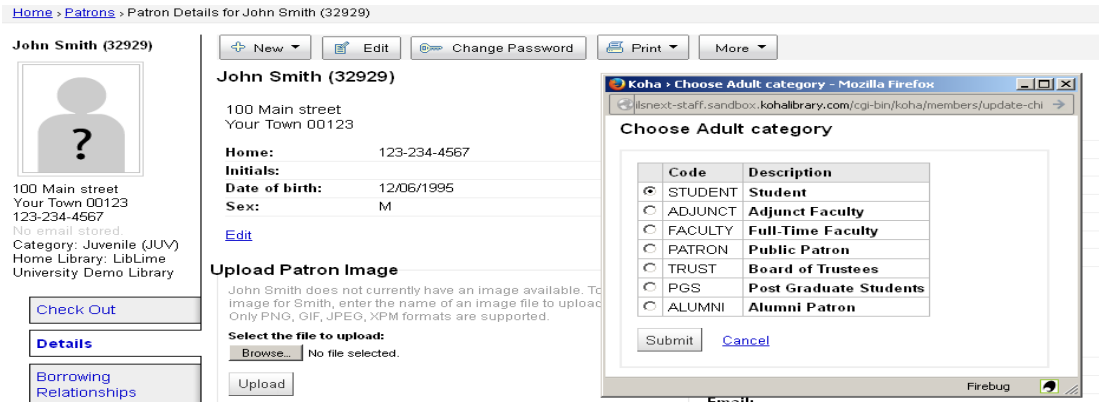
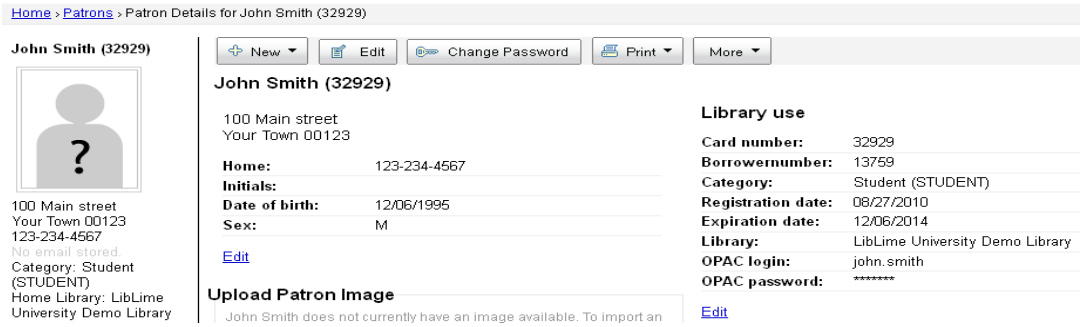
A pop-up window will show your Adult patron categories; select the appropriate one.



When you click Submit, the patron record will be updated.



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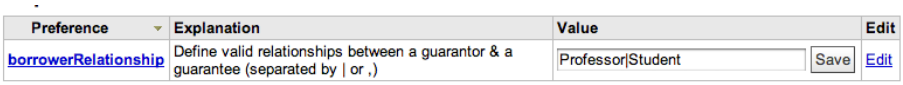
5.10 Proxy Borrowing

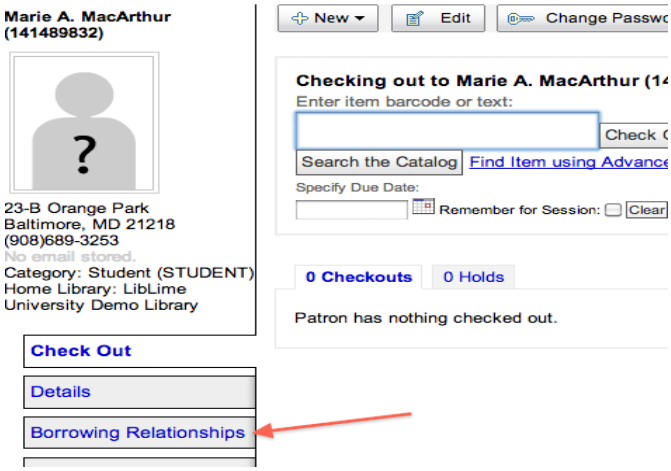
Proxy Borrowing allows one patron to check out items for another patron. Patrons may allow multiple other patrons to borrow on their behalf, and they may borrow on behalf of one or more other patrons.

In this feature, the proxy patron (A) is borrowing on behalf of another patron (B). Patron (B) is responsible for the loan and is assessed any fines related to the item. The proxy patron (A) should deliver the materials to the responsible patron (B), not use the responsible patron's privileges to borrow materials for their **own** (A's) use.

The system preference **borrowerRelationship** allows libraries to define different proxy relationships:



The Proxy relationship is set up from Checkout or from editing the patron record on the **Borrowing Relationships** tab, and can be setup from either the Main Patron or the Proxy:



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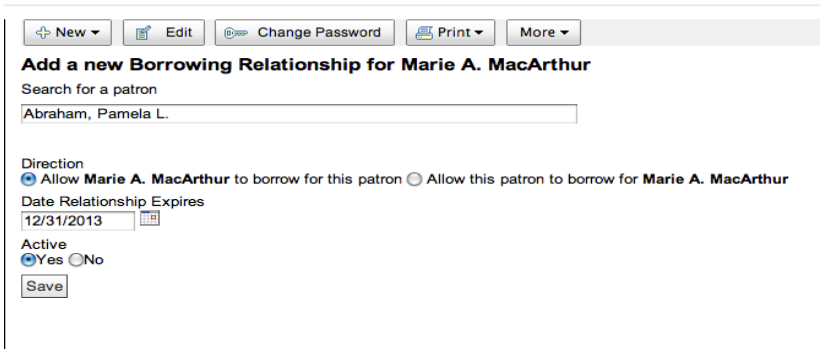
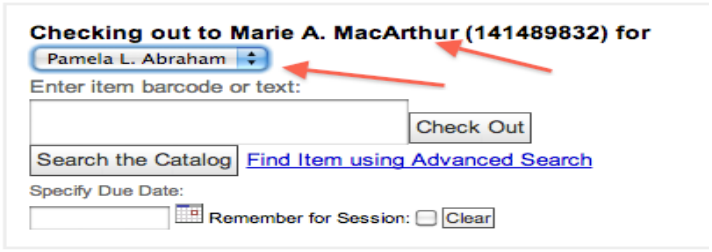
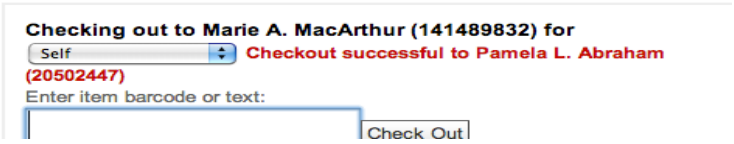
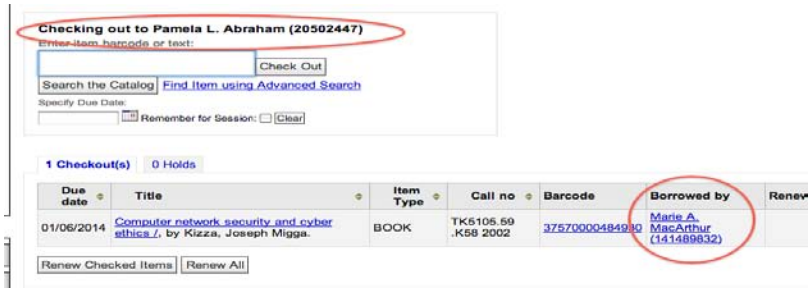


In Circulation, the Proxy is clearly indicated:







Patrons can set messaging options to be notified when a proxy borrower was added, deleted, or changed.

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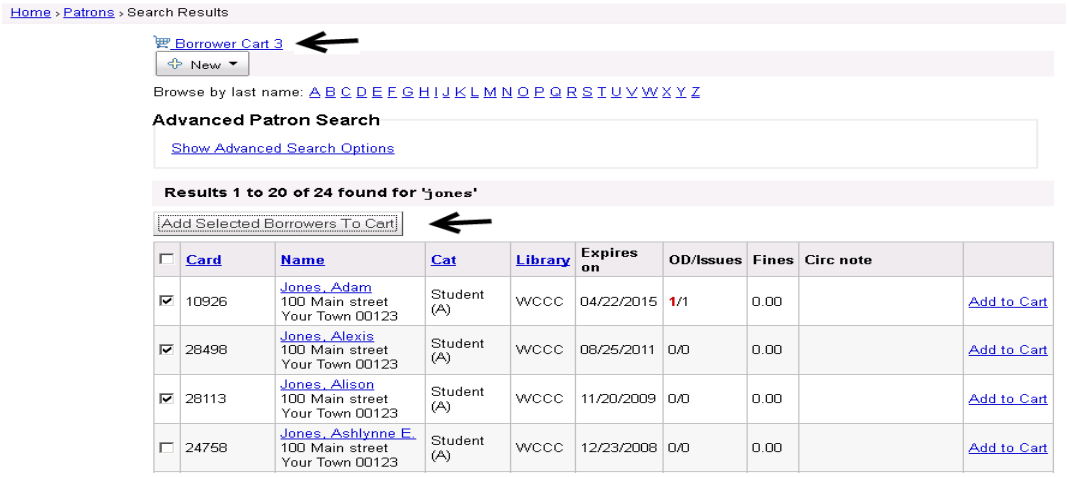
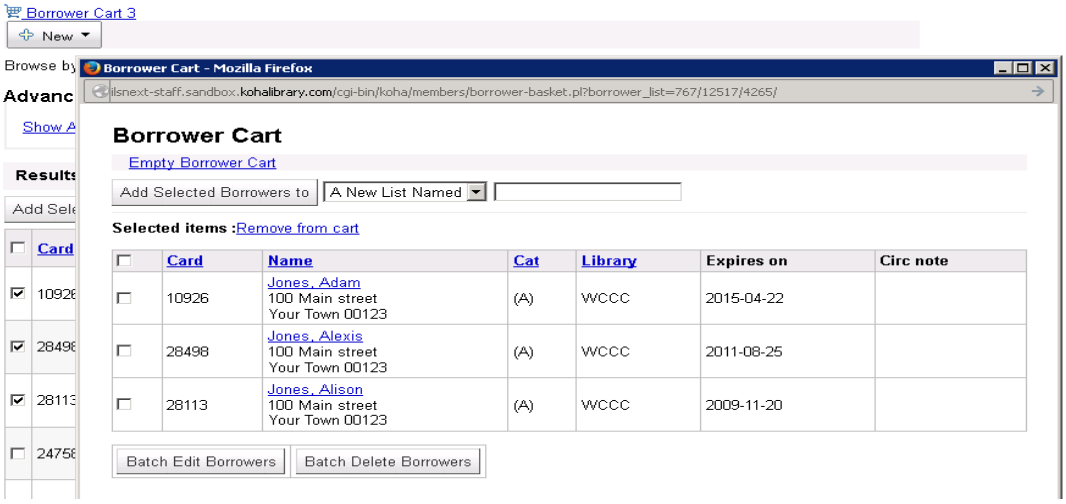
5.11 Batch Edit/Delete Patrons

You can use the Borrower Cart to batch edit or delete patron records. The first step is to search for the records you want. Check them on the results list, then click the Add Selected Borrowers to Cart button. The borrower cart link will change to show how many records are in the cart.



You can do another search and add more records to the cart until you have everyone you need. Then open the cart by clicking on the Borrower Cart link. A pop-up window shows the contents of the cart.



At the bottom, you have buttons to batch edit or batch delete. If you click Batch Edit, you'll get a warning message:

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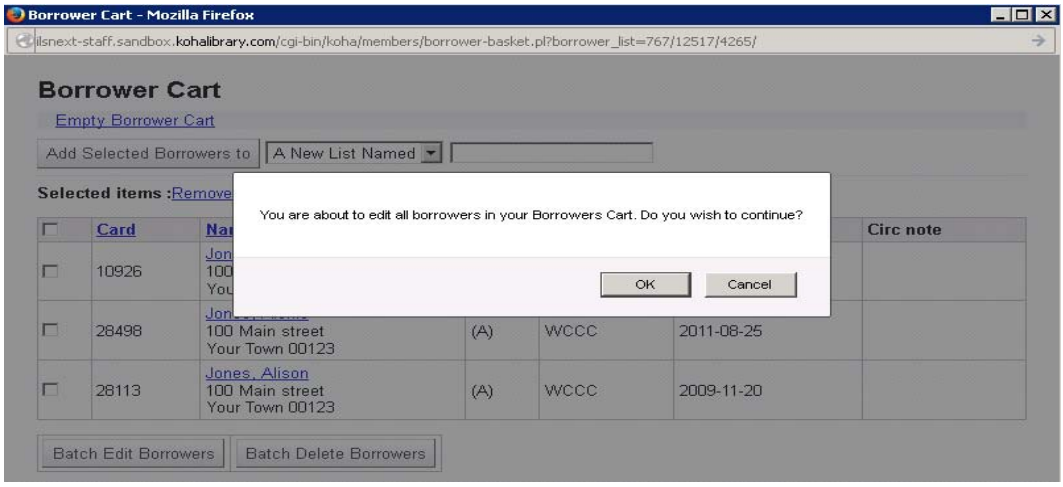
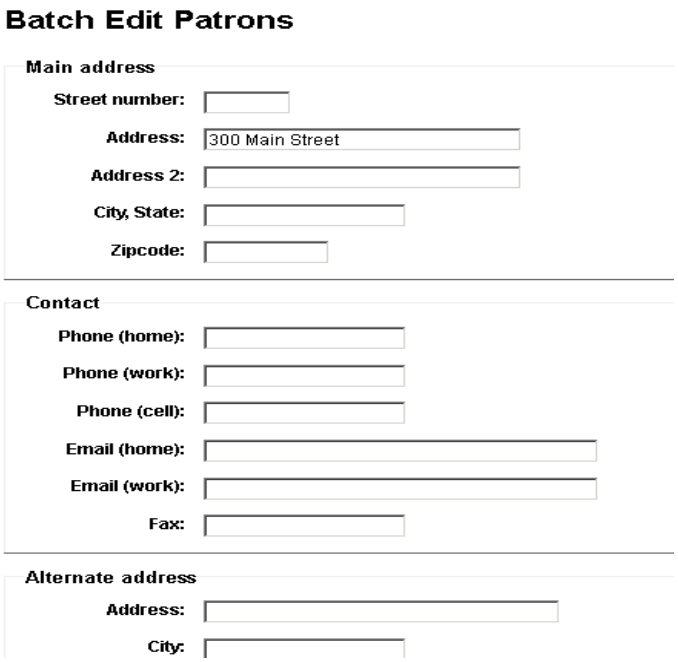


To edit, click OK. That will bring up an edit screen that resembles the standard patron edit. Make whatever changes should be done to the group of records.



Leave the other fields blank. Then scroll to the bottom and click Save. The records will be edited, and you'll be asked if you want to empty the cart. It's recommended that you do clear it at this point.

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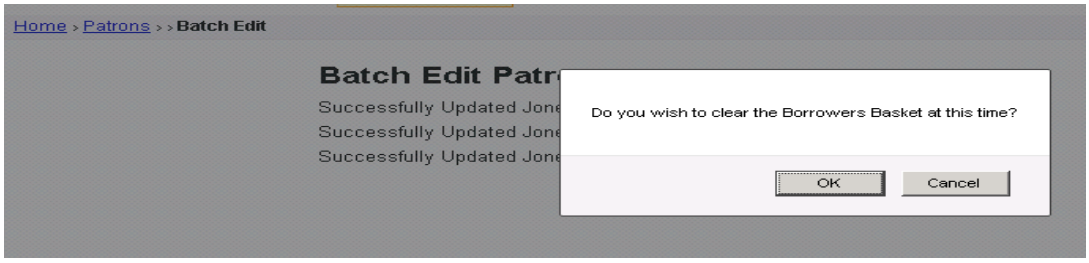
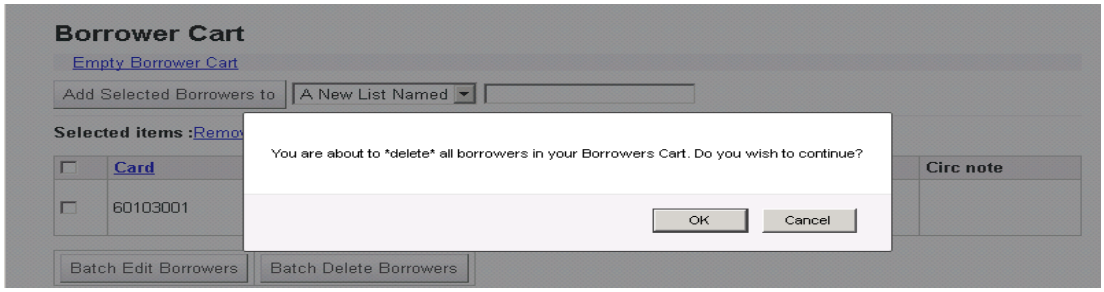

Home › Patrons › › Batch Edit
Batch Edit Patr
Successfully Updated Jone
Successfully Updated Jone
Successfully Updated Jone
Do you wish to clear the Borrowers Basket at this time?
OK
Cancel

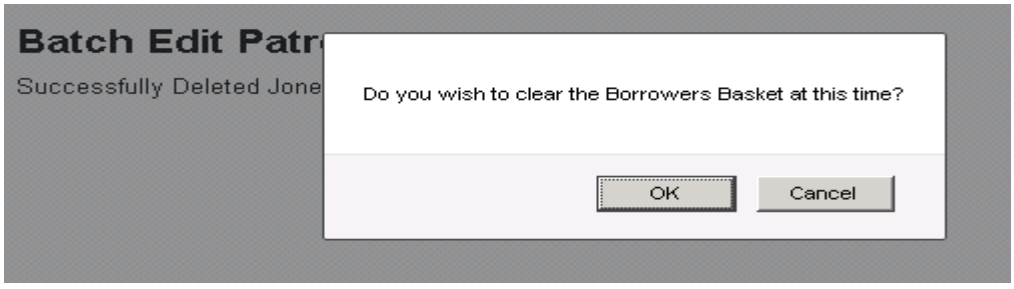
Look at the patron records, and you'll see that the change has been made.

	Card	Name	Cat	Library	Expires on	OD/Issues	Fines	Circ note	
☐	10926	Jones, Adam 300 Main Street Your Town 00123	Student (A)	WCCC	04/22/2015	1/1	0.00		Add to Cart
☐	28498	Jones, Alexis 300 Main Street Your Town 00123	Student (A)	WCCC	08/25/2011	0/0	0.00		Add to Cart
☐	28113	Jones, Alison 300 Main Street Your Town 00123	Student (A)	WCCC	11/20/2009	0/0	0.00		Add to Cart
☐	24758	Jones, Ashlynne E. 100 Main street Your Town 00123	Student (A)	WCCC	12/23/2008	0/0	0.00		Add to Cart

Batch delete is a similar process. Add your patron records to the cart, then open the cart and click the Batch Delete button. You'll get a warning message.



If you are sure you want to delete these records, click OK. You'll get a results screen and a message asking if you want to clear your cart. If a delete fails for some reason (material checked out, owes money, etc.) the record will still be in the cart:



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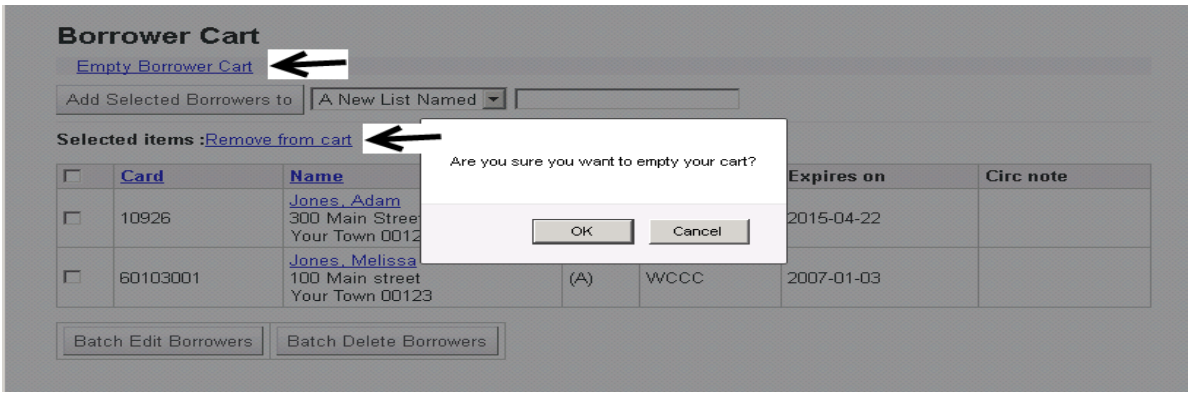
If you have added records to the cart, and then decide you don't want to do anything with them, you can either click the Empty Borrower Cart link, or check off individual records and click Remove from Cart. You'll be asked to confirm your action.

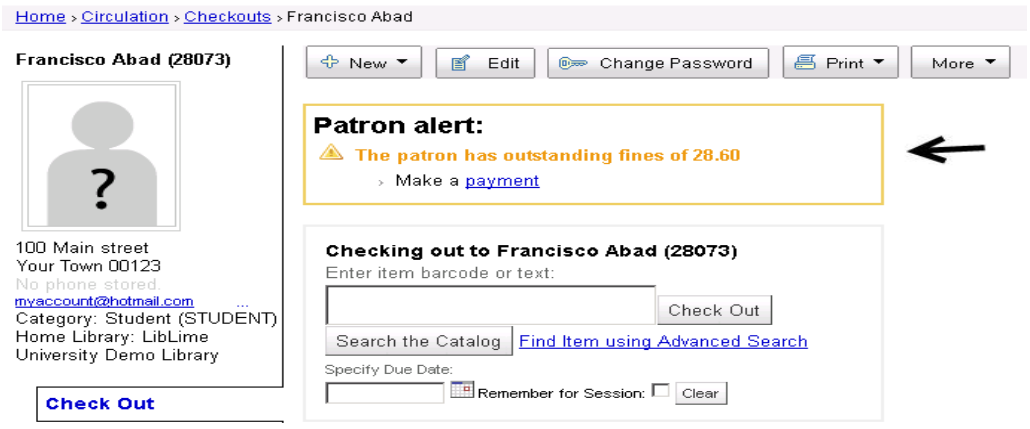


5.12 Fines

Fines are assessed automatically and manually. Automatic fines are controlled by settings in the Circulation and Fines Policies, and by cron jobs that are run on the server. Manual fines are created by staff for special charges.

5.12.1 Paying Fines

Any charges owed will show on the Checkout tab, and (depending on system configuration) may block the user from checking out until the charges are paid.



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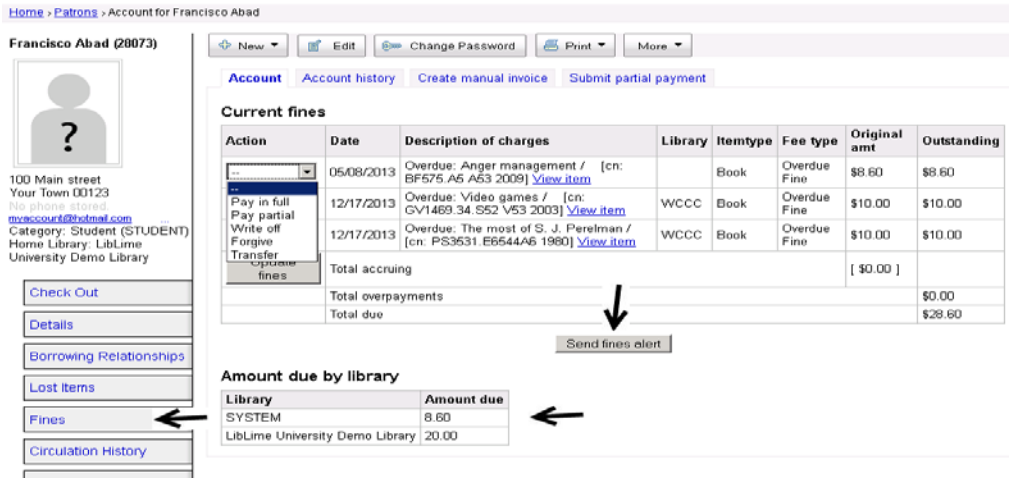
To accept payment from a patron, click the make a payment link on the checkout screen, or the Fines tab at the left side of the screen. Both take you into the Fines tab, to the current Account listing.



This screen shows all outstanding charges; charges that have been paid or cleared are on the Account History tab. Each fine will have an Action drop-down menu, where the staff can choose to Pay in full, Pay partial, Write off, Forgive or Transfer the fine. There is also a breakdown of amount owed by branch.

At this screen, you have the option to send an alert to the patron. If you click the Send Fines Alert button, the screen will ask you to confirm. Then the system will generate an email notice to the patron. The default text is something like this:

> According to our records, you have an outstanding balance of $28.60. Please remit payment soon as possible to avoid loss of borrowing privileges. Summary of outstanding fines and fees: 12/17/2013 Overdue: The most of S. J. Perelman / 10.00 12/17/2013 Overdue: Video games / 10.00 05/08/2013 Overdue: Anger management / 8.60 Total due:$28.60

The Fines screen then shows that a message has been sent:

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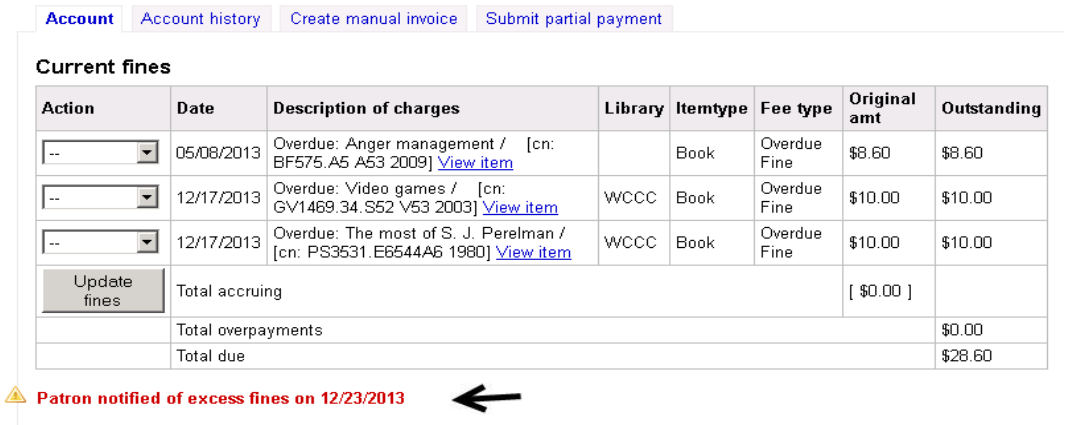
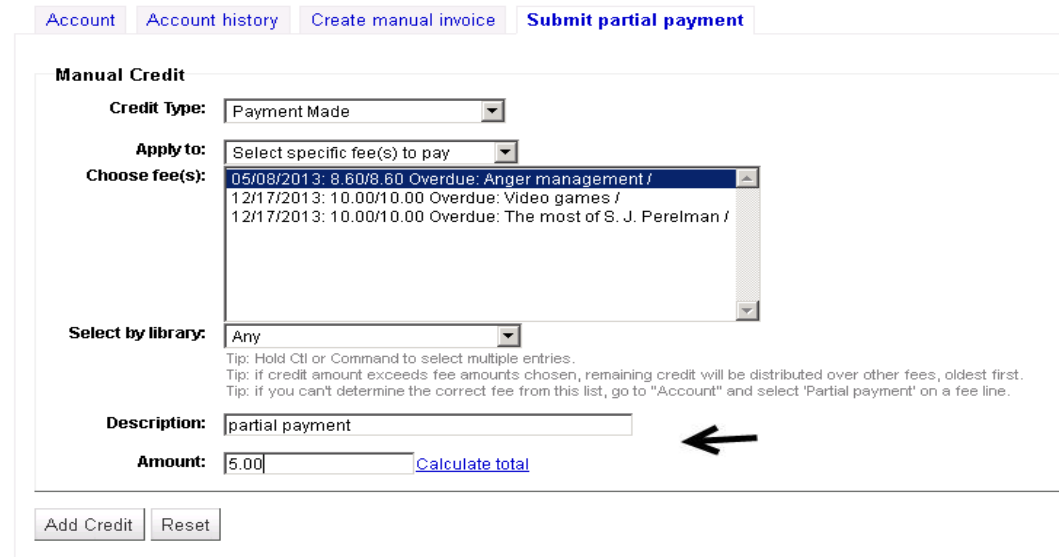

Account
Account history
Create manual invoice
Submit partial payment
Current fines
Action
Date
Description of charges
Library
Itemtype
Fee type
Original amt
Outstanding
-- 05/08/2013 Overdue: Anger management / [cn: BF575.A5 A53 2009] View item Book Overdue Fine $8.60 $8.60
-- 12/17/2013 Overdue: Video games / [cn: GV1469.34.S52 V53 2003] View item WCCC Book Overdue Fine $10.00 $10.00
-- 12/17/2013 Overdue: The most of S. J. Perelman / [cn: PS3531.E6544A6 1980] View item WCCC Book Overdue Fine $10.00 $10.00
Update fines
Total accruing
[$0.00]
Total overpayments
$0.00
Total due
$28.60
Patron notified of excess fines on 12/23/2013

Use the pull-downs next to each entry to choose your action, then click the Update Fines button. The fines will be updated; charges that are paid in full will be moved to the Account History tab. If you choose to make a partial payment, you'll be taken to another screen where you can enter the amount to be paid, and select to which charge it should be applied. Enter a description and the amount, and click Add Credit.


Account
Account history
Create manual invoice
Submit partial payment
Manual Credit
Credit Type:
Payment Made
Apply to:
Select specific fee(s) to pay
Choose fee(s):
05/08/2013: 8.60/8.60 Overdue: Anger management /
12/17/2013: 10.00/10.00 Overdue: Video games /
12/17/2013: 10.00/10.00 Overdue: The most of S. J. Perelman /
Select by library:
Any
Tip: Hold Ctl or Command to select multiple entries.
Tip: if credit amount exceeds fee amounts chosen, remaining credit will be distributed over other fees, oldest first.
Tip: if you can't determine the correct fee from this list, go to "Account" and select 'Partial payment' on a fee line.
Description:
partial payment
Amount:
5.00
Calculate total
Add Credit
Reset

The payment is applied and reflected on the Accounts screen.

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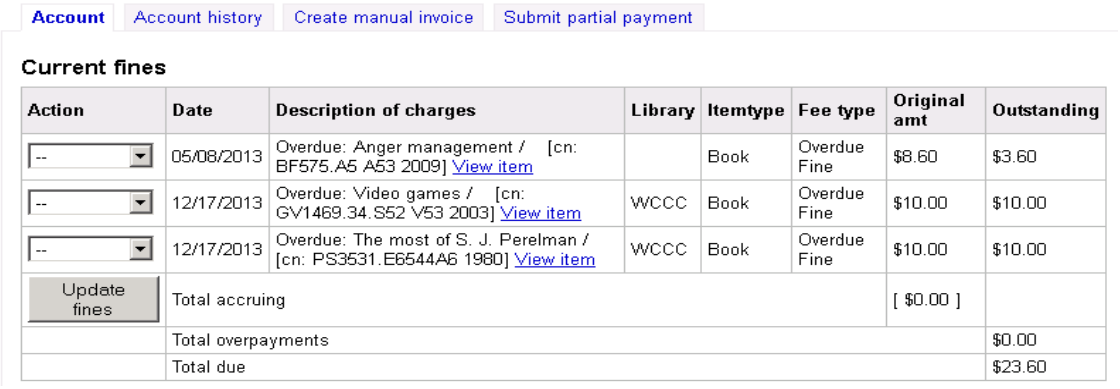


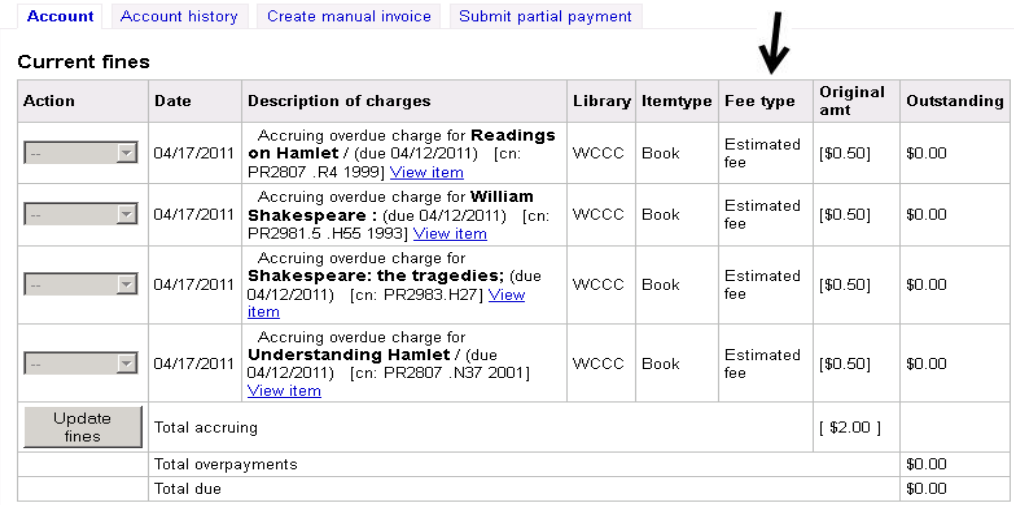
Account | Account history | Create manual invoice | Submit partial payment

Current fines

Action	Date	Description of charges	Library	Itemtype	Fee type	Original amt	Outstanding
--	05/08/2013	Overdue: Anger management / [cn: BF575.A5 A53 2009] View item		Book	Overdue Fine	$8.60	$3.60
--	12/17/2013	Overdue: Video games / [cn: GV1469.34.S52 V53 2003] View item	WCCC	Book	Overdue Fine	$10.00	$10.00
--	12/17/2013	Overdue: The most of S. J. Perelman / [cn: PS3531.E6544A6 1980] View item	WCCC	Book	Overdue Fine	$10.00	$10.00
Update fines	Total accruing					[$0.00]	
	Total overpayments						$0.00
	Total due						$23.60

5.12.2 Estimated Fines

Patrons with items that are currently overdue and accruing charges will show an estimated fine for those items:



Account | Account history | Create manual invoice | Submit partial payment

Current fines

Action	Date	Description of charges	Library	Itemtype	Fee type	Original amt	Outstanding
--	04/17/2011	Accruing overdue charge for **Readings on Hamlet** / (due 04/12/2011) [cn: PR2807 .R4 1999] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
--	04/17/2011	Accruing overdue charge for **William Shakespeare :** (due 04/12/2011) [cn: PR2981.5 .H55 1993] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
--	04/17/2011	Accruing overdue charge for **Shakespeare: the tragedies;** (due 04/12/2011) [cn: PR2983.H27] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
--	04/17/2011	Accruing overdue charge for **Understanding Hamlet** / (due 04/12/2011) [cn: PR2807 .N37 2001] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
Update fines	Total accruing					[$2.00]	
	Total overpayments						$0.00
	Total due						$0.00

Those fines cannot be paid until the item is returned. At that point, the system will calculate the full overdue charge, and the patron can then make a payment. The maximum overdue fine to be charged can be set in the circulation policy, if desired.

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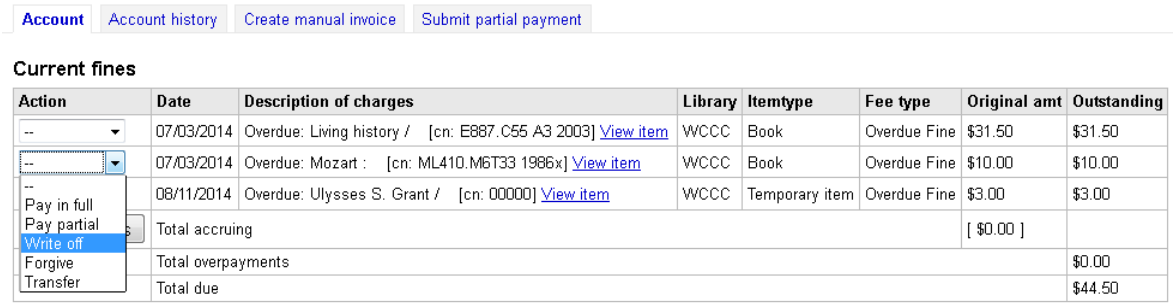
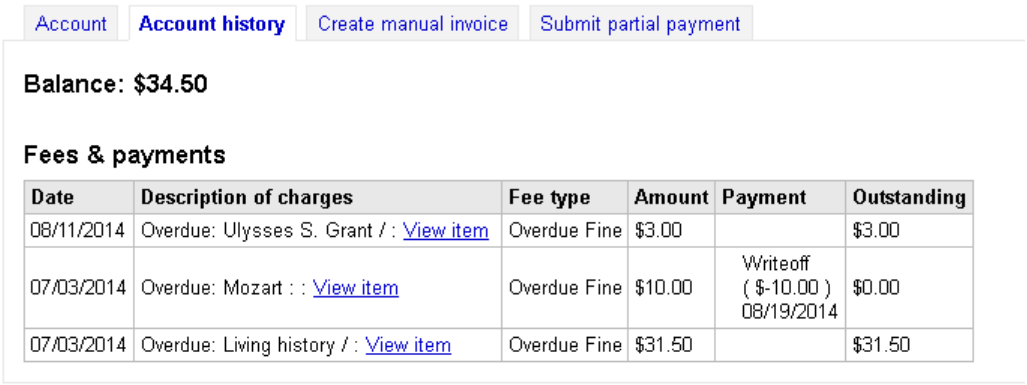
5.12.3 Waiving or Forgiving Fines

Library staff may choose to write off or forgive certain charges for various reasons. The difference is strictly an accounting one; there is no practical difference in how the system handles these. To either write off or forgive, choose that option from the pull-down next to a charge, and click the Update Fines button.



The charges are removed from the current accounts list. Under Account History, the action is shown:



5.12.4 Manual Charges

Manual fines (invoices) are assessed from the Fines, Create Manual Invoice tab. Several types of manual invoices are available, as well as a "Sundry" value for miscellaneous charges.

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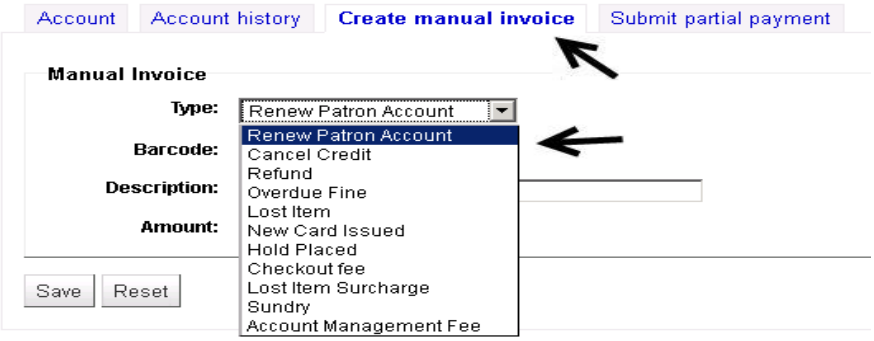
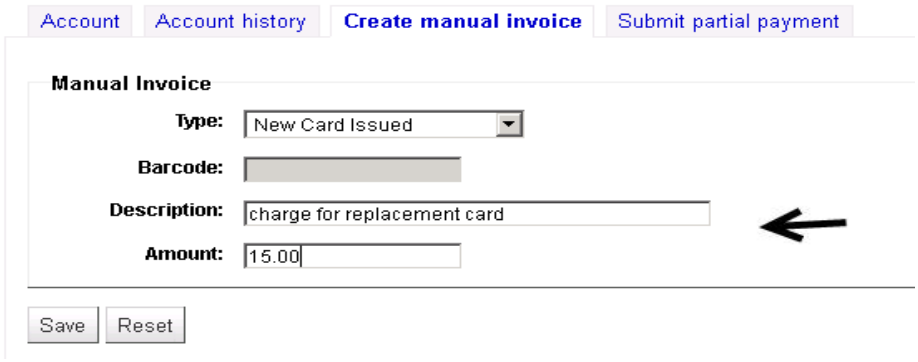
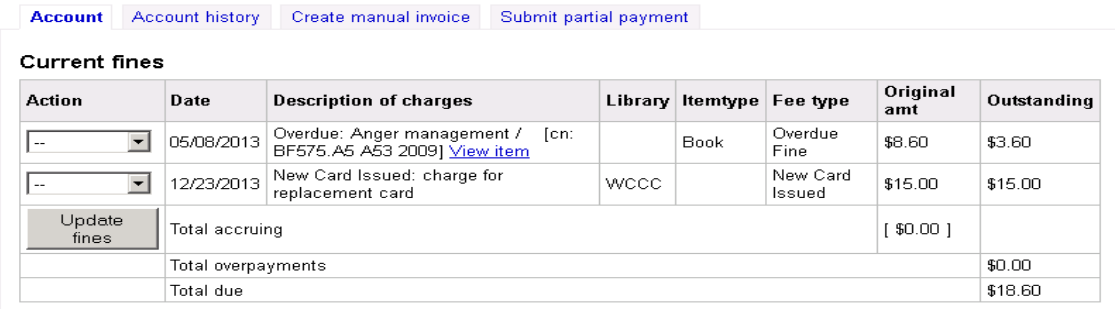


Manual invoices are intended for special charges, which are not part of standard overdue or lost handling. To create a charge, select a type from the pulldown. Then enter a description and an amount. If the charge is linked to an item for some reason, you can also enter a barcode.



Click Save, and the charge appears on the current Account tab.



5.12.5 Lost Item Handling

Items may be marked as lost either manually or through a cron job. If your site chooses to run that script, items that are more than the specified number of days overdue are automatically marked lost. When a checked-out item is marked lost, the patron is charged a replacement cost;

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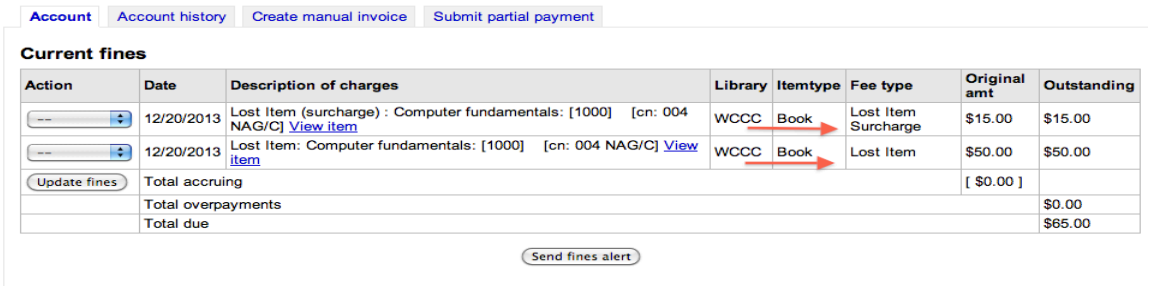
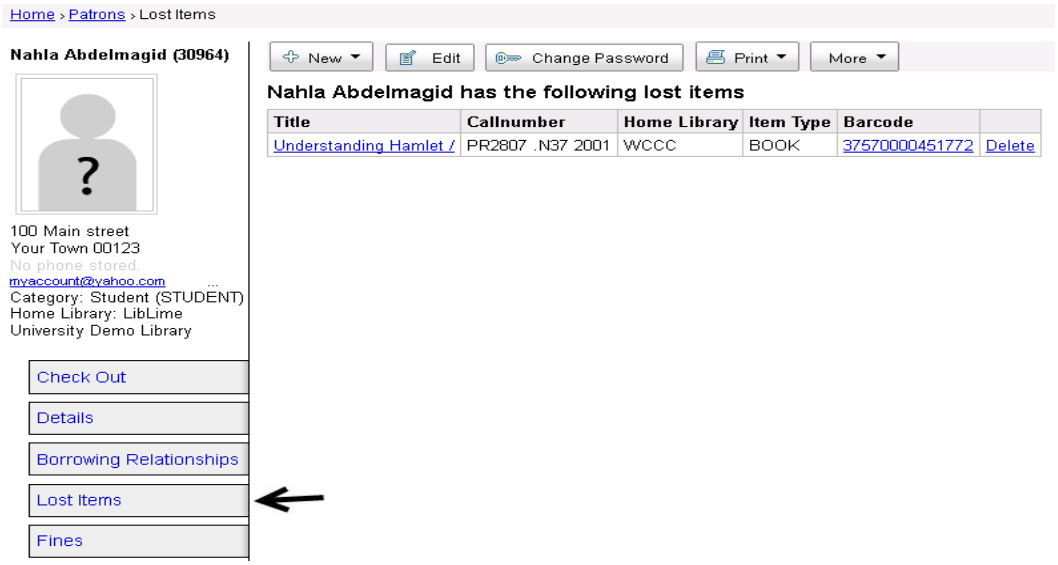
this is either the cost in the item record's replacement price field (subfield v) or a fallback default price specified in the item type policy. Your site may also opt to charge a processing surcharge (configured in the circulation and fines policies).



When an item is marked lost, it is removed from the patron's list of checkouts. In the patron record, the Lost Items tab will show items marked as lost for that patron.



To mark an item lost manually, go to the Item tab under the title record. You can get there by clicking the barcode from the patron's list of checkouts (the patron record Details or Checkout tab).

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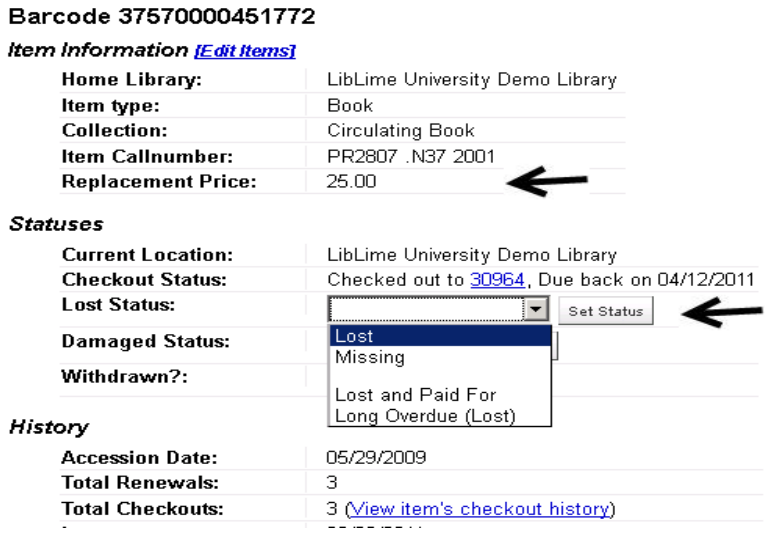
On the Item tab, make sure there is a replacement price in the record. Then use the pull-down to set the Lost status to the first Lost charge.



Several lost values are available in the pull-down, but are not appropriate in this situation. Only the first Lost entry will charge the replacement cost. Click the Set Status button. The item will be marked lost. It will be moved from the patron's list of checkouts to the patron's Lost Items tab, and the replacement cost will be charged under the Fines tab.

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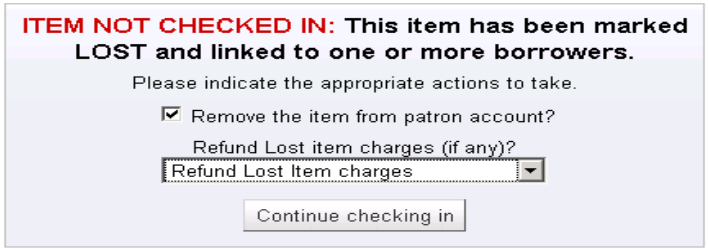
Account | Account history | Create manual invoice | Submit partial payment

Current fines

Action	Date	Description of charges	Library	Itemtype	Fee type	Original amt	Outstanding
--	04/17/2011	Accruing overdue charge for **Readings on Hamlet** / (due 04/12/2011) [cn: PR2807 .R4 1999] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
--	04/17/2011	Accruing overdue charge for **William Shakespeare :** (due 04/12/2011) [cn: PR2981.5 .H55 1993] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
--	04/17/2011	Accruing overdue charge for **Shakespeare: the tragedies;** (due 04/12/2011) [cn: PR2983.H27] View item	WCCC	Book	Estimated fee	[$0.50]	$0.00
--	12/23/2013	Lost Item (surcharge) : Understanding Hamlet / [37570000451772] [cn: PR2807 .N37 2001] View item	WCCC	Book	Lost Item Surcharge	$15.00	$15.00
--	12/23/2013	Lost Item: Understanding Hamlet / [37570000451772] [cn: PR2807 .N37 2001] View item	WCCC	Book	Lost Item	$25.00	$25.00
Update fines	Total accruing					[$1.50]	
	Total overpayments						$0.00

If a lost item is found, run it through checkin. Depending on how your system is configured, you may opt to refund any payments for replacement cost and surcharge, and charge an overdue fine.


ITEM NOT CHECKED IN: This item has been marked LOST and linked to one or more borrowers.
Please indicate the appropriate actions to take.
Remove the item from patron account?
Refund Lost item charges (if any)?
Refund Lost Item charges
Continue checking in

If you select "Remove the item from patron account" during the checkin, the item will be removed from the patron's Lost Items list.

5.12.6 Fine Threshold Forgiveness and Transfers

System administrators can create Fine Threshold and Transfer Configuration rules (in the Administration section) that can be used to batch-forgive fines. Alternatively, batches of patrons with specified fines can have those fines marked with a "transfer" status; a list of these patrons could be downloaded and sent to a registrar/bursar's office.

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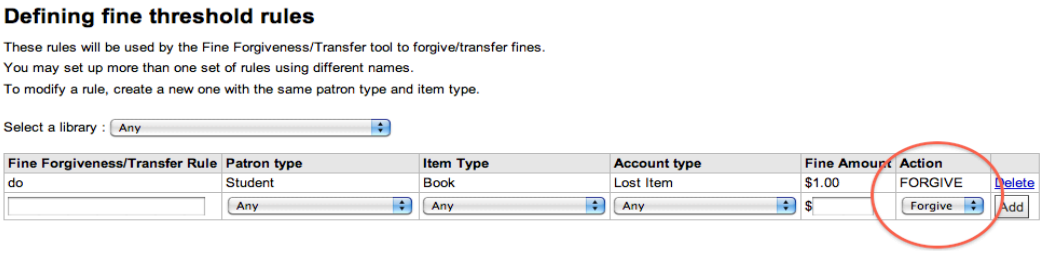
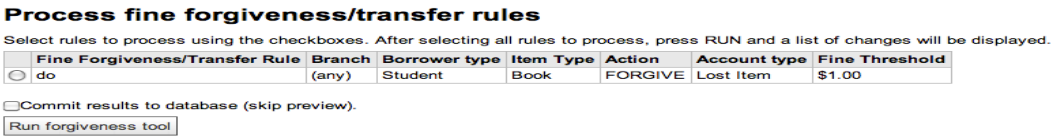
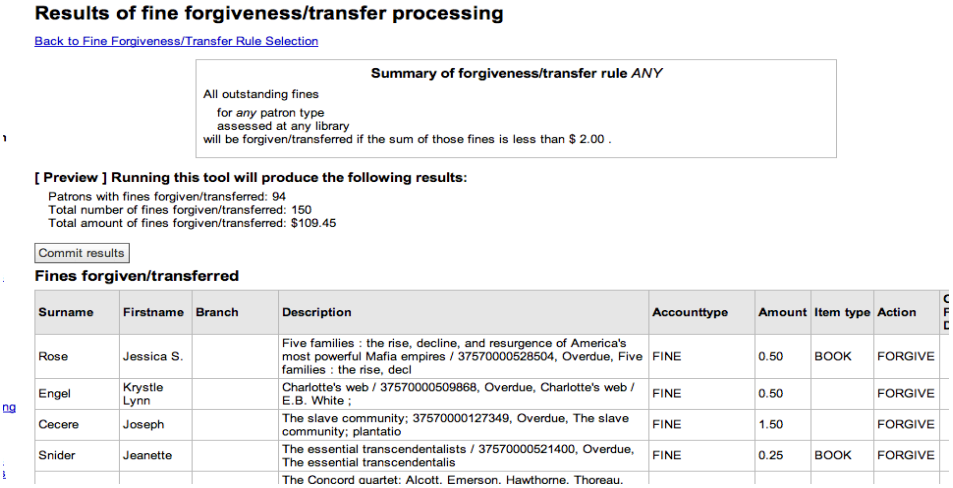


5.12.7 Forgiven Fines

After rules are defined, fines are batch-forgiven using Tools, Fine Threshold Forgiveness and Transfers.



When the forgiveness tool is run, results will display onscreen and the staff can decide whether to commit results to the database.



The **Forgiven Fines** tool will allow staff to download a list of patron names and fine amounts. This list could be sent to a registrar/bursar's office for processing.

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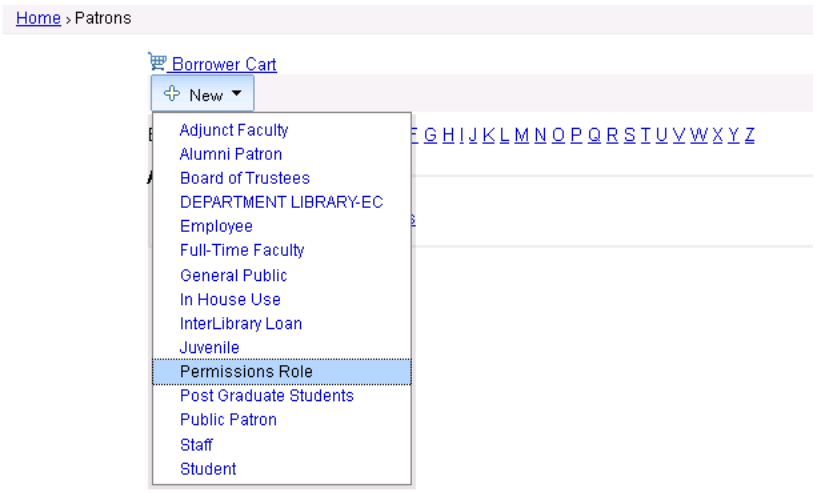
6. **Role Patrons and Default Permissions**

A Role patron is a record which can be used to assign default permissions and messaging options for both staff and patrons. Staff and patron records can then be linked to the role (or roles) and the role's defaults are inherited by the user. This linking can be done either individually in the user record, or by linking a Role to a patron category. Role patrons are set up and managed the same way as a standard patron account. They should all be created with a standard naming convention (such as SR CATALOGING ROLE) to help with searching and identification. This section will cover creating and assigning Roles and the granular permissions that can be enabled. The next section will cover messaging and messaging options as a separate topic, although messaging defaults can also be set in the Role patron.

6.1 Creating a Role Patron

To set up a staff role, go under Patron and click New. From the pull-down, select Permission Role.



This will bring up an abbreviated patron entry screen, tailored to the Role patron; give the record a name appropriate for its intent.

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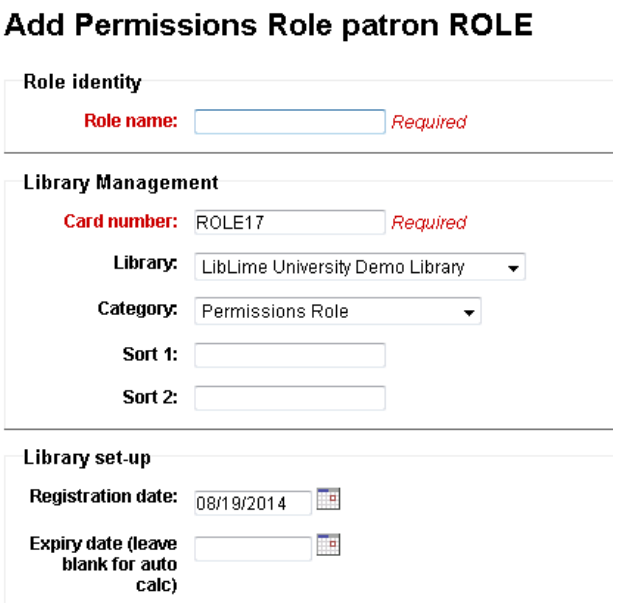
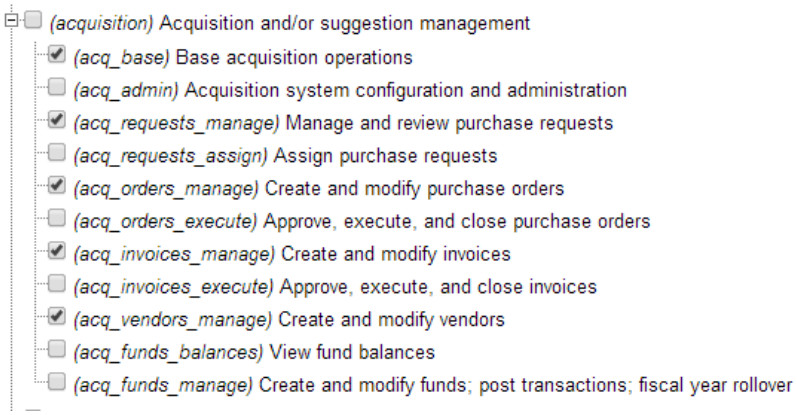


After saving, from the patron record display click More, Set Permissions. For example, a Junior Acquisitions role may get permissions allowing them to create and modify purchase orders, but not be given permission to approve or execute them. Set the needed permissions and save (click Set Flags button).


(acquisition) Acquisition and/or suggestion management
(acq_base) Base acquisition operations
(acq_admin) Acquisition system configuration and administration
(acq_requests_manage) Manage and review purchase requests
(acq_requests_assign) Assign purchase requests
(acq_orders_manage) Create and modify purchase orders
(acq_orders_execute) Approve, execute, and close purchase orders
(acq_invoices_manage) Create and modify invoices
(acq_invoices_execute) Approve, execute, and close invoices
(acq_vendors_manage) Create and modify vendors
(acq_funds_balances) View fund balances
(acq_funds_manage) Create and modify funds; post transactions; fiscal year rollover

6.2 Assigning Roles to User Records in the Patron Category

All users assigned to a particular patron category can be linked to a Role through the patron category policy setup. In Administration, Patron Categories, edit the applicable category and check the role(s) desired:

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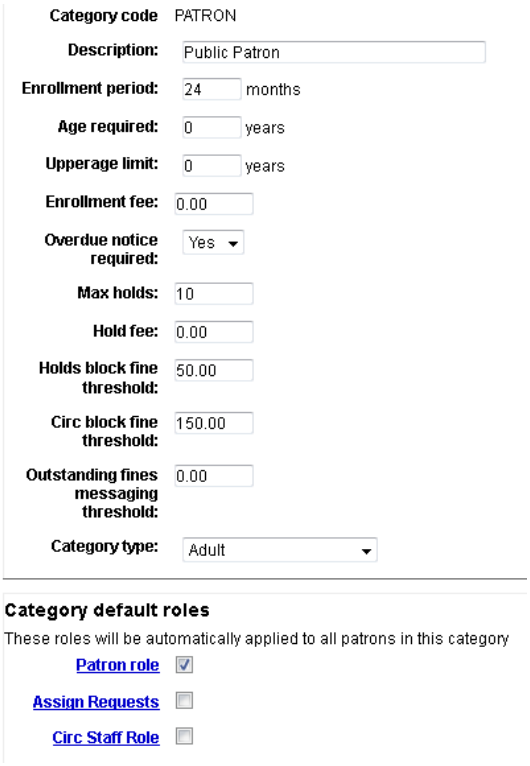

Note that general patrons as well as staff can be linked to a Role. For public users, the Role will be used primarily to define default messaging options (see that section). If a site is running the full DLS software, certain patrons can also be given default permissions to upload digital options.

6.3 Assigning Roles in the Individual Patron Record

You can also assign a Role to an individual patron record. Edit the patron record and scroll down to the User Roles section. Then check one or more Roles you want to assign to this particular person:

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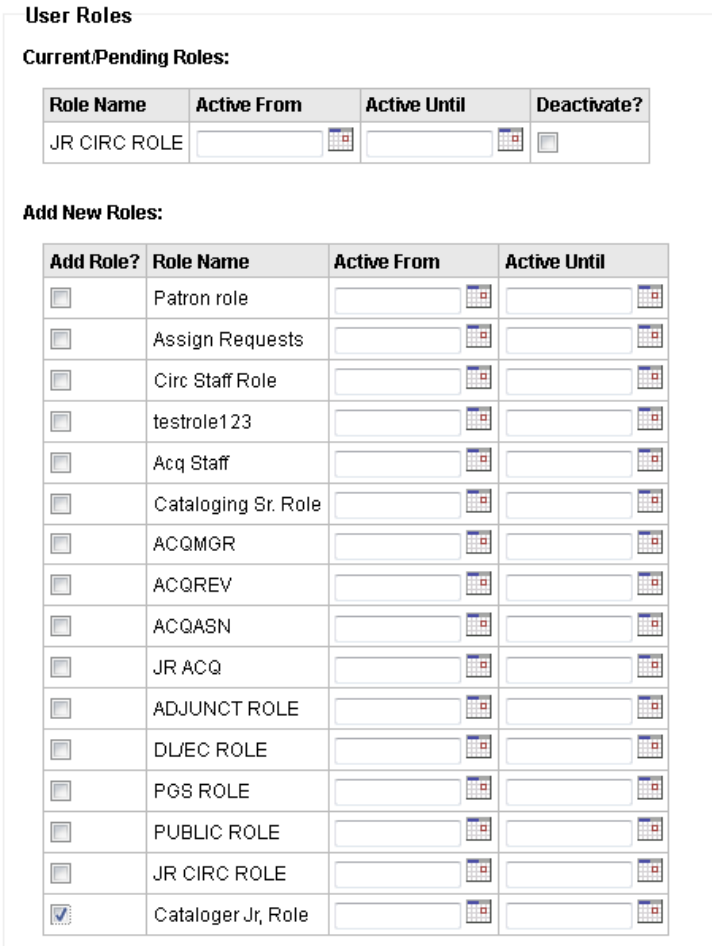
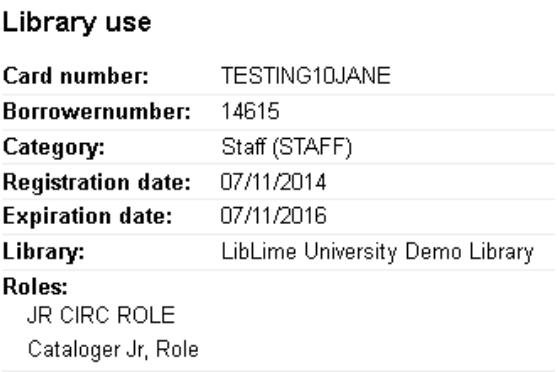


Any existing Role assignments will show at the top; add new ones as desired by checking their boxes. For existing Roles, note that you can assign an expiration date. This can be useful for temporary or visiting staff – you can assign a person certain expanded permissions with an expiration date. After that date, the assignment will automatically end. You can also cancel a Role assignment by clicking the Deactivate box.

When you save the record, the updated Role assignments are visible on the Details screen:



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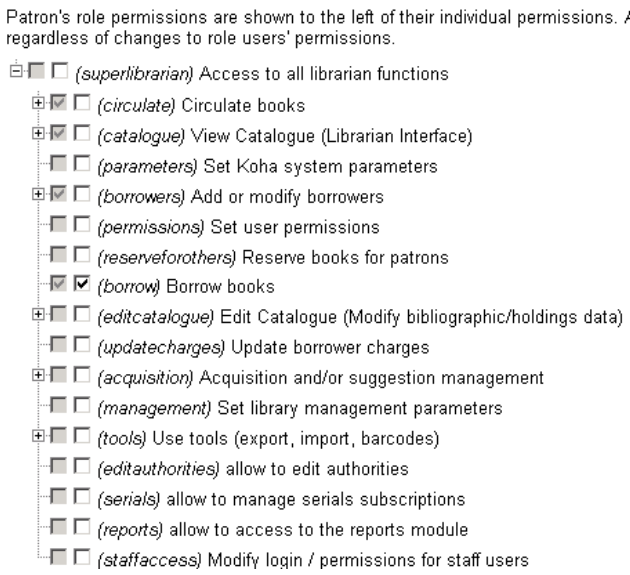
NOTE: Linking a patron and a role will change the display of the person who is linked to the role. If a staff person is set up with basic permission to borrow books as their only permission, and then assigned to/ linked with a Role which has further permissions, that staff person's account, after the Role is linked, will show ALL the permissions within that role.


Patron's role permissions are shown to the left of their individual permissions. Any individual permissions you set will persist regardless of changes to role users' permissions.
(superlibrarian) Access to all librarian functions
(circulate) Circulate books
(catalogue) View Catalogue (Librarian Interface)
(parameters) Set Koha system parameters
(borrowers) Add or modify borrowers
(permissions) Set user permissions
(reserveforothers) Reserve books for patrons
(borrow) Borrow books
(editcatalogue) Edit Catalogue (Modify bibliographic/holdings data)
(updatecharges) Update borrower charges
(acquisition) Acquisition and/or suggestion management
(management) Set library management parameters
(tools) Use tools (export, import, barcodes)
(editauthorities) allow to edit authorities
(serials) allow to manage serials subscriptions
(reports) allow to access to the reports module
(staffaccess) Modify login / permissions for staff users

6.4 Updating Permission Settings

If you edit a Role patron and change default settings for permissions or messaging, those changes will immediately be reflected in every patron record linked to that Role. If permissions were individually assigned, you will need to edit each patron record to change them. It is recommended that you set default permissions through a Role record whenever possible.

6.5 Available Granular Permissions

As of this writing the following permissions and groups are available; new development may add or change permissions in the future.

superlibrarian Access to all librarian functions

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circulate -- Circulate books
    self_checkout -- User can use the Self Checkout feature
    checkout_via_proxy -- Checkout via Proxy
    circulate_remaining_permissions -- Remaining circulation permissions
    fast_add -- User can use fast add functionality in checkout
    manage_courses -- View, Create, Edit and Delete Courses
    OR_checkouts_exceed_maxissues -- Override circ block due to max checkouts setting
    OR_fines_exceed_circ_block_threshold -- Override circ block due to excessive patron fines
    OR_fines_exceed_holds_block_threshold -- Override holds block due to excessive fines
    OR_holds_exceed_maxholds -- Override hold block due to maxholds setting
    OR_hold_policy_block -- Override hold block due to policy setting
    OR_item_issued_to_another -- Override circ block due to item being checked out
    OR_item_notforloan Override -- circ block due to item notforloan status
    OR_item_not_at_circ_library -- Override circ block due to item away from circulating library
    OR_item_on_hold -- Override circ block due to item on hold
    OR_item_on_hold_and_waiting -- Override circ block due to item on hold and waiting
    OR_item_withdrawn -- Override circ block due to item withdrawn status
    OR_renewals_exceed_maxrenewals -- Override renewal block due to maxrenewals setting
    OR_renewal_on_hold -- Override renewal block due to hold
    override_renewals -- Override blocked renewals
    put_coursereserves -- Basic Course Reserves access, user can put items on course reserve
    remove_coursereserves -- Take items off course reserve
    manage_ill_requests -- Manage interlibrary loan requests
catalogue -- View Catalogue (Librarian Interface)
    access -- Access staff client & search functions
    search_deleted -- Search deleted bibliographic records
    bib_ratings -- Rate titles and view title ratings
        view -- View title ratings
        modify -- Rate titles
parameters -- Set Koha system parameters

borrowers -- Add or modify borrowers
    batch_borrower_delete -- Batch delete borrowers
    batch_borrower_edit -- Batch edit borrowers
    borrowers_remaining_permissions -- Remaining Borrowers Permissions
    create_proxy_relationships -- Create Proxy Relationships
    delete_lost_items -- Delete Lost Items from patron account
    delete_proxy_relationships -- Delete Proxy Relationships
    edit_proxy_relationships -- Edit Proxy Relationships
    lists -- Create & Edit Borrower Lists
    lists_bulk_modify -- Modify All Accounts on a Borrower List
    lists_bulk_delete -- Delete Accounts on a Borrower List during a Bulk Modification

permissions -- Set user permissions

reserveforothers -- Reserve books for patrons

borrow -- Borrow books

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editcatalogue -- Edit Catalogue (Modify bibliographic/holdings data)
- batch_item_delete -- Batch Item Delete
- batch_item_edit -- Batch Item Edit
- notifications -- Subscribe to catalog-related event notifications
  - catsource= *
- bib -- Manage bibliographic records
  - update -- Create/Update/Delete Bibliographic records
    - catsource= *
  - delete -- Delete Bibliographic records
    - catsource= *
  - stage -- Stage a bibliographic record to an import batch or as an intermediate save
    - catsource= *
  - commit -- Commit staged changes to a bibliographic record
    - catsource= *
  - merge -- Merge the items of one bibliographic record with another
    - catsource= *
- mfhd -- Manage MFHD records
  - update -- Create/Update/Delete MFHD records
    - catsource= *
  - stage -- Stage a MFHD record to an import batch or as an intermediate save
    - catsource= *
  - commit Commit staged changes to a MFHD record
    - catsource= *
- auth -- Manage authority records
  - update -- Create/Update/Delete Authority records
  - stage -- Stage an authority record to an import batch or as an intermediate save
  - commit -- Commit staged changes to an authority record
- template -- Manage MARC templates
  - update -- Create/Update/Delete MARC templates
- dlso -- Manage digital objects
  - upload -- Create and stage an import record for a digital object
    - catsource= *
  - attach -- Attach a digital object to an existing bib
    - catsource= *
  - delete -- Delete a DLSO from the underlying store

updatecharges -- Update borrower charges

acquisition -- Acquisition and/or suggestion management
- acq_base -- Base acquisition operations
- acq_admin -- Acquisition system configuration and administration
- acq_requests_manage -- Manage and review purchase requests
- acq_requests_assign -- Assign purchase requests
- acq_orders_manage -- Create and modify purchase orders
- acq_orders_execute -- Approve, execute, and close purchase orders
- acq_invoices_manage -- Create and modify invoices
- acq_invoices_execute -- Approve, execute, and close invoices

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acq_vendors_manage -- Create and modify vendors
acq_funds_balances -- View fund balances
acq_funds_manage -- Create and modify funds; post transactions; fiscal year rollover

management -- Set library management parameters

tools -- Use tools (export, import, barcodes)
batch_upload_patron_images -- Upload patron images in batch or one at a time
delete_anonymize_patrons -- Delete old borrowers and anonymize circulation history (deletes borrower reading history)
edit_calendar -- Define days when the library is closed
edit_news -- Write news for the OPAC and staff interfaces
edit_notices -- Define notices
edit_notice_status_triggers -- Set notice/status triggers for overdue items
export_catalog -- Export bibliographic and holdings data
fine_threshold_forgive -- Run fine threshold forgiveness rules
import_patrons -- Import patron data
inventory -- Perform inventory (stocktaking) of your catalogue
label_creator -- Create printable labels and barcodes from catalog and patron data
manage_staged_marc -- Managed staged MARC records, including completing and reversing imports
moderate_comments -- Moderate patron comments
schedule_tasks -- Schedule tasks to run
stage_marc_import -- Stage MARC records into the reservoir
view_system_logs -- Browse the system logs
send_general_messages -- Send general messages

serials -- allow to manage serials subscriptions

reports -- allow to access to the reports module

staffaccess -- Modify login / permissions for staff users

*If the site is using catalog access control, codes identified in the authorized value PSCOPE-catsource will show in this section; permissions can be assigned to add/edit/delete only specified collection titles and items. If the site is also using external authentication such as LDAP, then the Retrieve Bibliographic records (editcatalogue, bib, get) MUST be assigned to all public and staff Roles or users will not be able to search.

6.6 Assigning Permissions in a Role Patron

After the Role record is created and saved, click More, Set Permissions.

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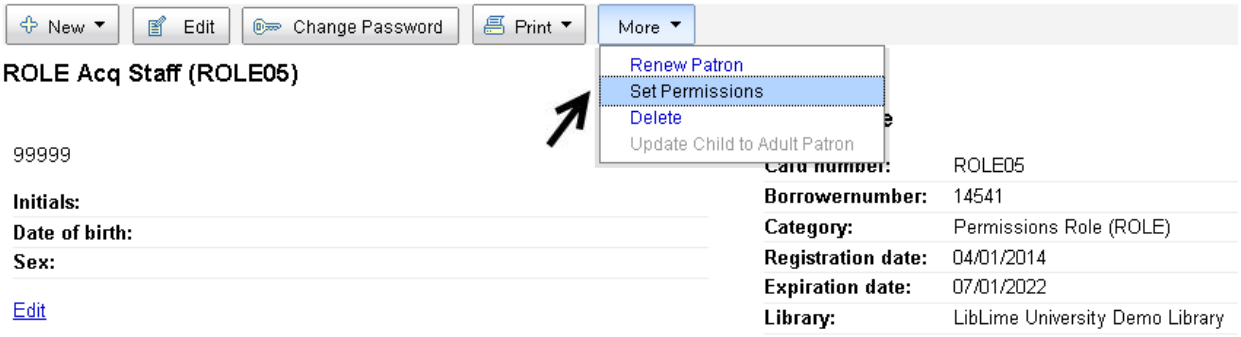
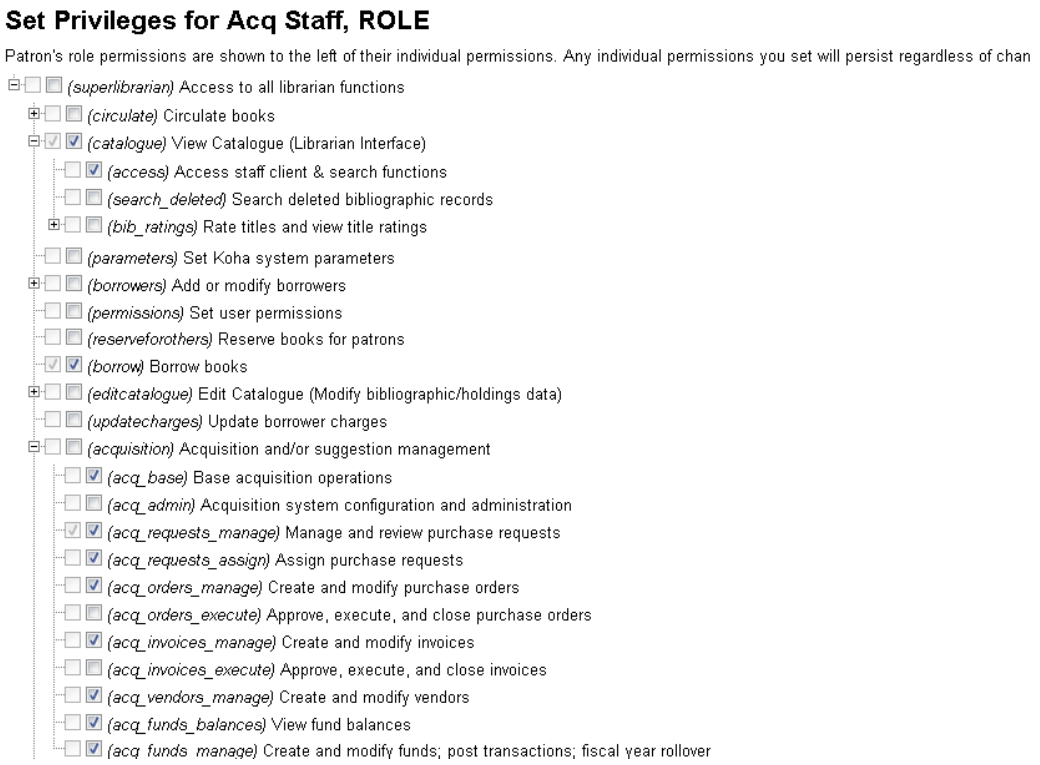


This opens up a screen with check boxes for various actions. For staff roles, you must assign the *catalogue / access* permission or else the user will not be able to log into the staff client at all. Decide what permissions this Role should have and assign them in the right-hand checkbox column:


Set Privileges for Acq Staff, ROLE
Patron's role permissions are shown to the left of their individual permissions. Any individual permissions you set will persist regardless of chan
(superlibrarian) Access to all librarian functions
(circulate) Circulate books
(catalogue) View Catalogue (Librarian Interface)
(access) Access staff client & search functions
(search_deleted) Search deleted bibliographic records
(bib_ratings) Rate titles and view title ratings
(parameters) Set Koha system parameters
(borrowers) Add or modify borrowers
(permissions) Set user permissions
(reserveforothers) Reserve books for patrons
(borrow) Borrow books
(editcatalogue) Edit Catalogue (Modify bibliographic/holdings data)
(updatecharges) Update borrower charges
(acquisition) Acquisition and/or suggestion management
(acq_base) Base acquisition operations
(acq_admin) Acquisition system configuration and administration
(acq_requests_manage) Manage and review purchase requests
(acq_requests_assign) Assign purchase requests
(acq_orders_manage) Create and modify purchase orders
(acq_orders_execute) Approve, execute, and close purchase orders
(acq_invoices_manage) Create and modify invoices
(acq_invoices_execute) Approve, execute, and close invoices
(acq_vendors_manage) Create and modify vendors
(acq_funds_balances) View fund balances
(acq_funds_manage) Create and modify funds; post transactions; fiscal year rollover

Scroll to the bottom and click the Set Flags button. Those permissions will be assigned to any staff record linked to that Role.

6.7 Assigning Permissions in an Individual Patron Record

A library staff user is created in the same way as a regular patron, except that you must select a patron category that has been designated as library staff. (Patron categories can be classified as

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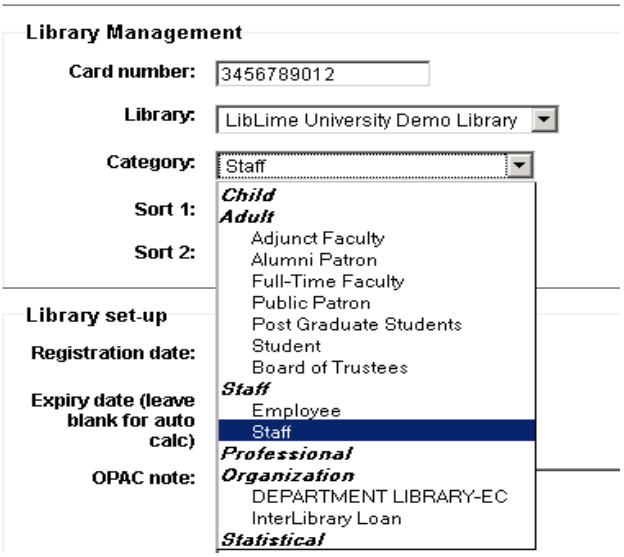
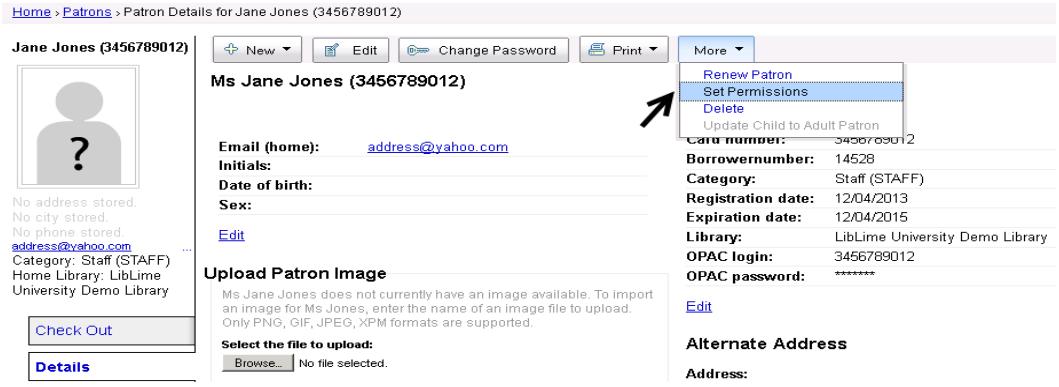
Adult, Child, Staff, or some other special designations – Staff tells the system the user is a library staff person and is allowed to do certain actions.)



See the previous section for assigning permissions via User Roles. Permissions can also be configured individually. After the record is created and saved, click More, Set Permissions.



Remember, you must assign the *catalogue / access* permission or else the user will not be able to log into the staff client at all. The left-hand checkbox column will show what permissions are assigned in any linked Role (a user record can be linked to multiple roles). These cannot be removed in the individual record. Decide what additional permissions this user should have and assign them in the right-hand checkbox column. If a staff user is given a Role permission, but also individual permissions, the individual permissions will have priority. For example, the Role may not permit editing items, but if the staff person's individual record has that permission, the staff person will be allowed to edit items.

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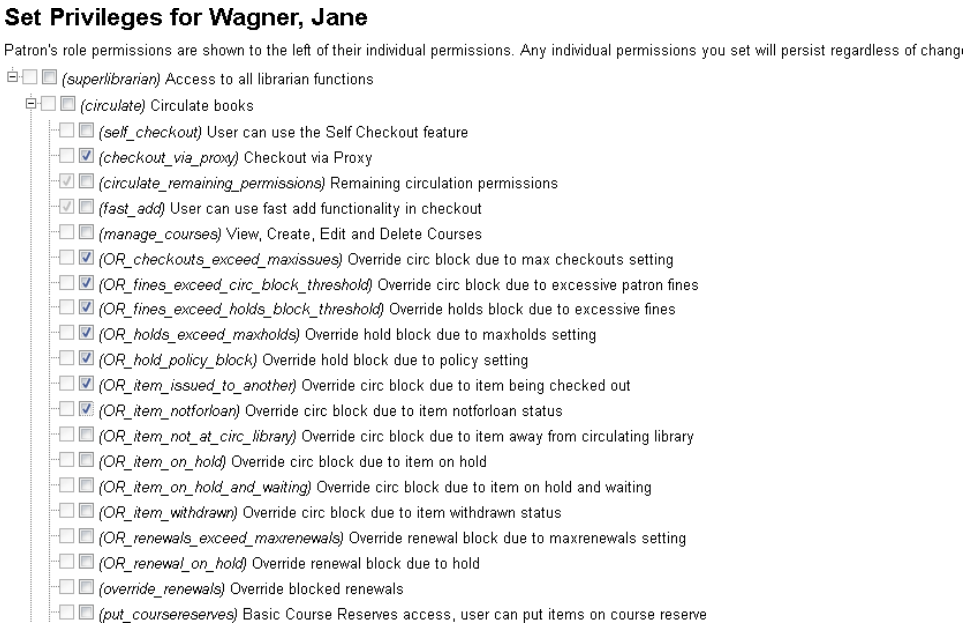
Set Privileges for Wagner, Jane
Patron's role permissions are shown to the left of their individual permissions. Any individual permissions you set will persist regardless of chang
(superlibrarian) Access to all librarian functions
(circulate) Circulate books
(self_checkout) User can use the Self Checkout feature
(checkout_via_proxy) Checkout via Proxy
(circulate_remaining_permissions) Remaining circulation permissions
(fast_add) User can use fast add functionality in checkout
(manage_courses) View, Create, Edit and Delete Courses
(OR_checkouts_exceed_maxissues) Override circ block due to max checkouts setting
(OR_fines_exceed_circ_block_threshold) Override circ block due to excessive patron fines
(OR_fines_exceed_holds_block_threshold) Override holds block due to excessive fines
(OR_holds_exceed_maxholds) Override hold block due to maxholds setting
(OR_hold_policy_block) Override hold block due to policy setting
(OR_item_issued_to_another) Override circ block due to item being checked out
(OR_item_notforloan) Override circ block due to item notforloan status
(OR_item_not_at_circ_library) Override circ block due to item away from circulating library
(OR_item_on_hold) Override circ block due to item on hold
(OR_item_on_hold_and_waiting) Override circ block due to item on hold and waiting
(OR_item_withdrawn) Override circ block due to item withdrawn status
(OR_renewals_exceed_maxrenewals) Override renewal block due to maxrenewals setting
(OR_renewal_on_hold) Override renewal block due to hold
(override_renewals) Override blocked renewals
(put_coursereserves) Basic Course Reserves access, user can put items on course reserve

The permissions assigned depend on the person's work needs. Superlibrarian is the system administrator permission; you should not assign it to logins intended for daily library work. Instead, review what that person will need to do, and assign permissions accordingly. For example, a person who works at the Circulation Desk will need most of the permissions in the circulate group, but you may not want that person to be able to override certain checkout blocks such as "Override circ block due to excessive patron fines." Leave those permissions unchecked.

Someone working at the Circulation Desk will probably also need at least the "Remaining Borrowers Permissions" setting (to be able to search and display patron records), but you may not want to allow other patron actions such as batch edit/delete. The library staff person may also need "Update borrower charges" to be able to take payment for fines. However, this person would not be given permissions in other areas such as Acquisitions, Tools, or Cataloging.

Set the permissions you think this staff role will need, then click the Set Flags button to save them. Then log in as that user and test it. Make sure the login can do all the actions needed, but cannot do anything that should be blocked. When that person logs in, the initial menu will be much more limited than that of someone with full administrator permissions.

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7. Messaging and Message Preference Defaults

The system now has a common infrastructure which is used for all messages and notifications. This replaces three previous mutually incompatible subsystems for managing messages. The messaging infrastructure supports two different classes of messages: **unicast** and **multicast**. A unicast message is sent to a specific patron or recipient address; examples include fines alerts, account details/welcome emails, and approval or rejections notifications sent to patrons who submit purchase requests. A multicast message occurs in response to a particular event, and is received by patrons who are subscribed to that message type through their message receipt preferences.

Each message has a specific **message type**, associated with a unique code such as *ODUE* ("overdue"), *PR.approved* ("purchase request approved"), or *gen.letter* (general purpose letter). Message types are grouped into categories such as *Acquisition* or *Announcements*. Some message types exist in both unicast and multicast flavors; others only occur in one variant or the other.

Messages can be delivered to one or more **message endpoint types**. Currently defined endpoint types include:

- Pop-up – these appear as the familiar info or alert boxes in the Discovery Layer.
- List – these appear in the "My Messages" tab of the Discovery Layer
- RSS – these are available once a user subscribes to their messages RSS feed using their browser or RSS reader
- Email – these are sent to the user's email address

More endpoint types may be added in the future.

The delivery of messages is governed by patrons' **message receipt preferences**, which can be set either through the Discovery Layer ("My Messaging Preferences" tab) or through the staff patron editor. A patron must *subscribe* to a particular message via a particular endpoint to receive messages (exception: delivery can be forced using the staff message send tool, see below). Subscription can happen directly, through the patron's own preferences, or indirectly, through their roles or their category roles. For example, if the "STUDENT" category were assigned a "ROLESTUDENT" category default role, and ROLESTUDENT were subscribed to advance

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notices by pop-up and email, then any student who did not override these preferences would receive advance pop-ups and emails.

IMPORTANT: While the messaging options include overdue notices, patrons are NOT able to opt out of receiving emailed overdue notices. Those will always be sent regardless of messaging settings.

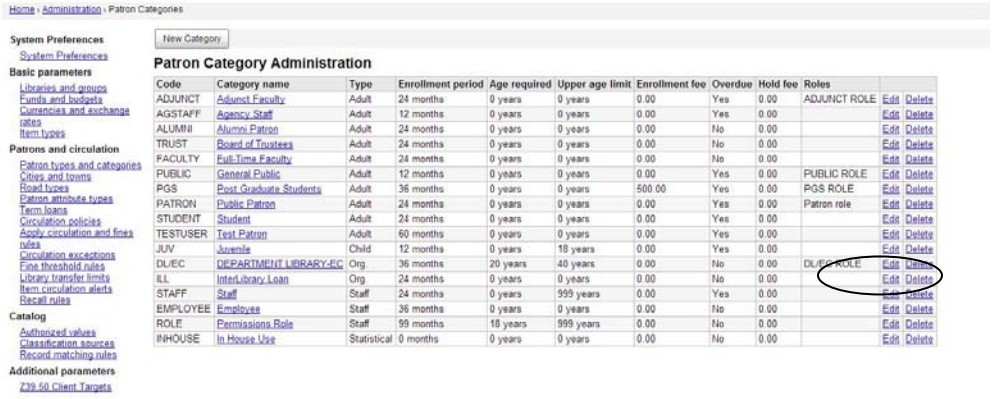
7.1 Staff Management of Patron Messaging Preferences

7.1.1 Role Settings

Library staff can set defaults in the assigned Role patron, and those will be picked up when a new record is created, but staff can also change settings at any time for an individual patron. Role patron settings are edited the same way as individual patron settings (see below).

Changes to a role's messaging settings take effect immediately to all patrons who consume this role.

Remember that patrons can be assigned roles directly through the patron edit screen (where you can assign roles and decide when they expire), or through their patron category, via the *category default roles* which are set up in *Administration -> Patron categories*.


Home › Administration › Patron Categories
System Preferences
System Preferences
Basic parameters
Libraries and groups
Funds and budgets
Currencies and exchange rates
Item types
Patrons and circulation
Patron types and categories
Cities and towns
Road types
Patron attribute types
Term loans
Circulation policies
Apply circulation and fines rules
Circulation exceptions
Fine threshold rules
Library transfer limits
Item circulation alerts
Recall rules
Catalog
Authorized values
Classification sources
Record matching rules
Additional parameters
Z39.50 Client Targets
New Category
Patron Category Administration
Code Category name Type Enrollment period Age required Upper age limit Enrollment fee Overdue Hold fee Roles
ADJUNCT Adjunct Faculty Adult 24 months 0 years 0 years 0.00 Yes 0.00 ADJUNCT ROLE Edit Delete
AGSTAFF Agency Staff Adult 12 months 0 years 0 years 0.00 Yes 0.00 Edit Delete
ALUMNI Alumni Patron Adult 24 months 0 years 0 years 0.00 No 0.00 Edit Delete
TRUST Board of Trustees Adult 24 months 0 years 0 years 0.00 No 0.00 Edit Delete
FACULTY Full-Time Faculty Adult 24 months 0 years 0 years 0.00 No 0.00 Edit Delete
PUBLIC General Public Adult 12 months 0 years 0 years 0.00 Yes 0.00 PUBLIC ROLE Edit Delete
PGS Post Graduate Students Adult 36 months 0 years 0 years 500.00 Yes 0.00 PGS ROLE Edit Delete
PATRON Public Patron Adult 24 months 0 years 0 years 0.00 Yes 0.00 Patron role Edit Delete
STUDENT Student Adult 24 months 0 years 0 years 0.00 Yes 0.00 Edit Delete
TESTUSER Test Patron Adult 60 months 0 years 0 years 0.00 Yes 0.00 Edit Delete
JUV Juvenile Child 12 months 0 years 18 years 0.00 Yes 0.00 Edit Delete
DL/EC DEPARTMENT LIBRARY-EC Org 36 months 20 years 40 years 0.00 No 0.00 DL/EC ROLE Edit Delete
ILL InterLibrary Loan Org 24 months 0 years 0 years 0.00 No 0.00 Edit Delete
STAFF Staff Staff 24 months 0 years 999 years 0.00 Yes 0.00 Edit Delete
EMPLOYEE Employee Staff 36 months 0 years 0 years 0.00 No 0.00 Edit Delete
ROLE Permissions Role Staff 99 months 18 years 999 years 0.00 No 0.00 Edit Delete
INHOUSE In House Use Statistical 0 months 0 years 0 years 0.00 No 0.00 Edit Delete

Message preferences obtained through roles are additive. For example, if role X is set to get overdue notices by email, and role Y is set to get overdue notices by RSS, then a patron with both roles will receive overdue notices both by email and RSS.

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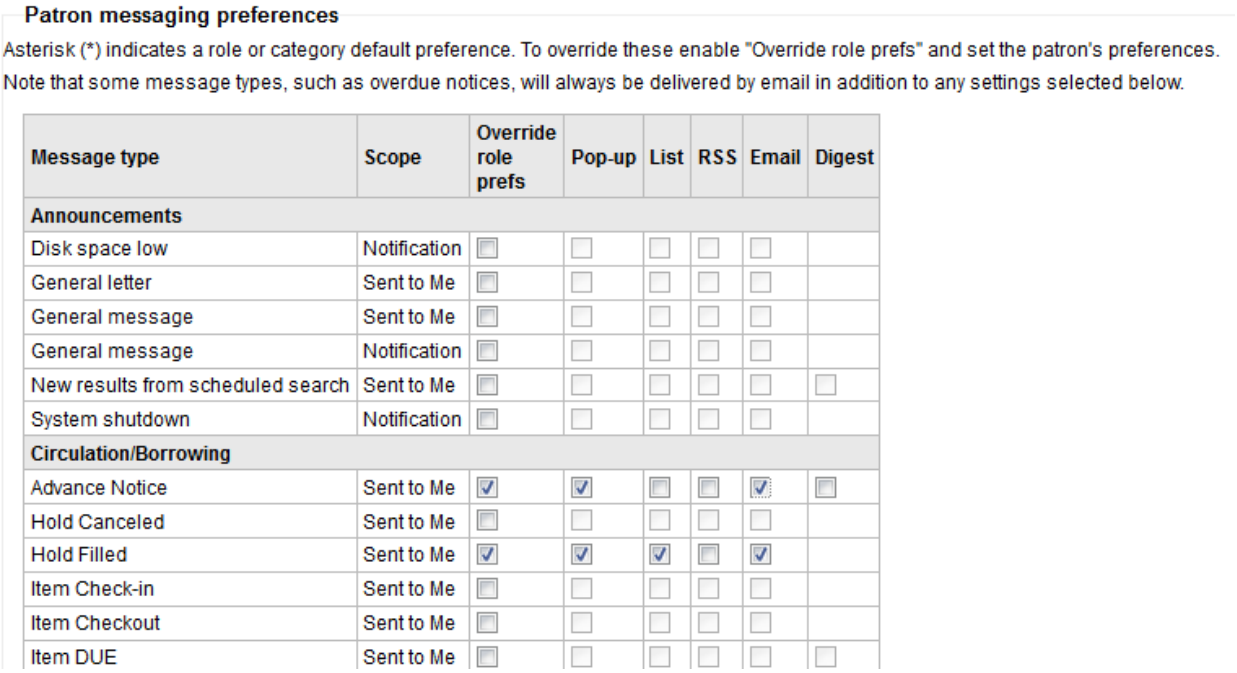
7.1.2 Role or Individual Patron Settings

To change messaging options for either a Role patron or a particular patron, you can either edit the full patron record (scroll to the bottom) or click the Edit link under the messaging options part of the patron detail display screen. That link takes you into an edit page for just the messaging options.



Patron messaging preferences

Asterisk (*) indicates a role or category default preference. To override these enable "Override role prefs" and set the patron's preferences.
Note that some message types, such as overdue notices, will always be delivered by email in addition to any settings selected below.

Message type	Scope	Override role prefs	Pop-up	List	RSS	Email	Digest
Announcements							
Disk space low	Notification	☐	☐	☐	☐	☐	
General letter	Sent to Me	☐	☐	☐	☐	☐	
General message	Sent to Me	☐	☐	☐	☐	☐	
General message	Notification	☐	☐	☐	☐	☐	
New results from scheduled search	Sent to Me	☐	☐	☐	☐	☐	☐
System shutdown	Notification	☐	☐	☐	☐	☐	
Circulation/Borrowing							
Advance Notice	Sent to Me	☑	☑	☐	☐	☑	☐
Hold Canceled	Sent to Me	☐	☐	☐	☐	☐	
Hold Filled	Sent to Me	☑	☑	☑	☐	☑	
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	
Item DUE	Sent to Me	☐	☐	☐	☐	☐	☐

NOTE: Regardless of role or individual settings, overdue notices will ALWAYS be sent by email. Patrons may not opt out completely from that message.

Role preference settings are indicated by asterisks and a grayed-out check on a patron display page. For example, if a user is subscribed by their roles to receive Advance notice messages by pop-up and list, then an asterisk (*) will appear next to the corresponding checkboxes for this message (see screenshot above).

The user's own preferences are governed by the checkboxes; the *Override role prefs* box must be checked to assign the user preferences that differ from their role preferences. No asterisk will appear next to the check marks for these message settings.

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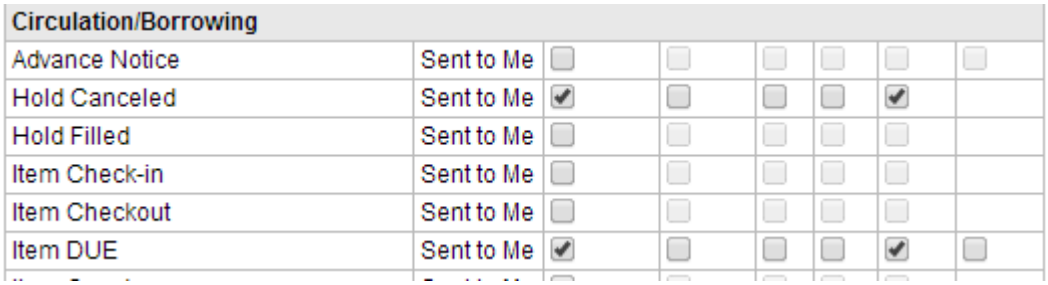

Circulation/Borrowing							
Advance Notice	Sent to Me	☐	☐	☐	☐	☐	☐
Hold Canceled	Sent to Me	☑	☐	☐	☐	☑	
Hold Filled	Sent to Me	☐	☐	☐	☐	☐	
Item Check-in	Sent to Me	☐	☐	☐	☐	☐	
Item Checkout	Sent to Me	☐	☐	☐	☐	☐	
Item DUE	Sent to Me	☑	☐	☐	☐	☑	☐

IMPORTANT: there is a subtle but important semantic difference between user and role preferences. For example, suppose Alice and Bob are both assigned the *AdultPatronRole* role, and that role is subscribed to receive overdue messages by RSS alone. Alice's preferences are overridden (by the staff member checking the *Override role preferences* box) but the staff member keeps them as they are (i.e., *RSS* is checked, but all others are unchecked). Later, a staff member decides to change the *AdultPatronRole* role to receive overdue notices by email. Now, Bob will receive these by email, because he has not overridden his role preferences. **Alice, however, will still get overdue notices by RSS, because she has overridden her role preferences.** If she (or a staff member) unchecks *Override role preferences*, she will automatically go back to the current role defaults (email).

Patrons may only be subscribed to message types appropriate to their permissions set. For example, patrons cannot subscribe to catalog multicast messages sent when bibliographic record batches are staged or committed unless they have the *cataloguing.bib* permission.

IMPORTANT: if a patron is granted permissions, subscribed to a privileged message type, and then the permissions are removed, the patron will still be subscribed to that message type, even though it will not appear in their messaging preferences (either in the Discovery Layer or staff side). This should be corrected in a future release.

7.1.3 Most Common Types of Messages

From the patron's point of view, these are the most important messages; others are more specialized. The three Proxy messages relate to the proxy borrowing feature. The messages would notify the patron when a proxy borrower was added, deleted, or changed. Item DUE and Advance Notice are controlled by a cron job. The advance notice message sends an email the specified number of days before an item is due, alerting the patron to renew or return the item. The item due notice is sent on the morning something is due. Note that the number of days in advance the Advance Notice is sent is controlled under the User Preferences section of the record:

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Variable	Enabled	User value	Description
Search behavior			
default_query_filter	☐		Must be a valid Solr fq filter.
use_default_filter	☐	☐	State of "Default Filter" in search results page
Messages and Notifications			
message_popup_duration	☐		Duration (s) of expiring DL pop-up alerts; 0 for indefinite
message_poll_interval	☐		Interval (s) between polling for pop-up and list messages
predue_advance_days	☑	5	Days in advance to receive notifications of items due; 0 for no advance notice

Submit Cancel

See the earlier discussion of this section under Search Filters.

Hold Filled is the message that is sent to the patron when a hold is triggered. Item Checkout and Item Check-In are generated at checkout or checkin – a message saying what items were checked out or returned. It could be used instead of a printed slip.

The Interlibrary Loan group of messages will notify patrons about the status of those requests. If your site allows patrons to make purchase suggestions, those messages may be used.

Digest mode, where available, does not give details. A regular advance notice or item due notice would list the titles and item details. The digest version would only say something like "you have 3 items due." No item details are available.

The most common (and strongly recommended) settings for patrons are Hold Filled and Advance Notice.

Other messaging options may be added by future development. The text for these messages is found under Tools, Message Templates and may be modified (see that section), but should be kept fairly generic. Since people can use different day-in-advance setting for advance notices, the notice should not specify a time period. Use wording such as "due soon" rather than "due in three days" so that it applies to all users.

7.1.4 Patron Management of Messaging Preferences

Patrons can manage their own messaging preferences; see the Discovery Layer section later in this manual.

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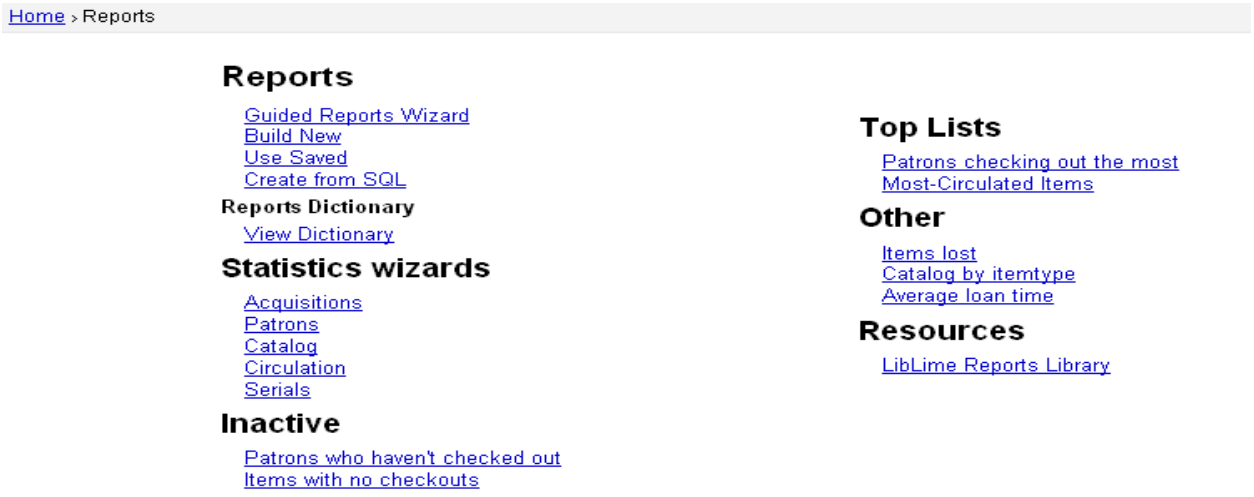
8. Reports

All item, patron, and transactional data is stored in various tables, which can be queried using MySQL commands through the Reports interface. There are some wizards and canned reports, but the best results will come through more precise queries designed to get at the particular data needed. Sites will need someone with some SQL query expertise, and will also need to understand the basic table structure. This SQL query will list all the table and fieldnames in the current database:

```
select TABLE_NAME, COLUMN_NAME from information_schema.columns
where table_schema != 'information_schema' order by TABLE_NAME asc
```

The most important tables are biblio, biblioitems, items, borrowers, issues (checkouts), reserves (holds), and statistics. Links between tables are on the internal system unique identifier – biblionumber, itemnumber, borrowernumber. For example, to check what items a patron has on hold, one could query the reserves table for that patron's borrowernumber. Other parameters would probably need to be set, and additional information pulled from other tables (such as the patron's name, item barcode, and title) to get the results in a usable format.

The Reports menu has several options:



8.1 Guided Report Wizard

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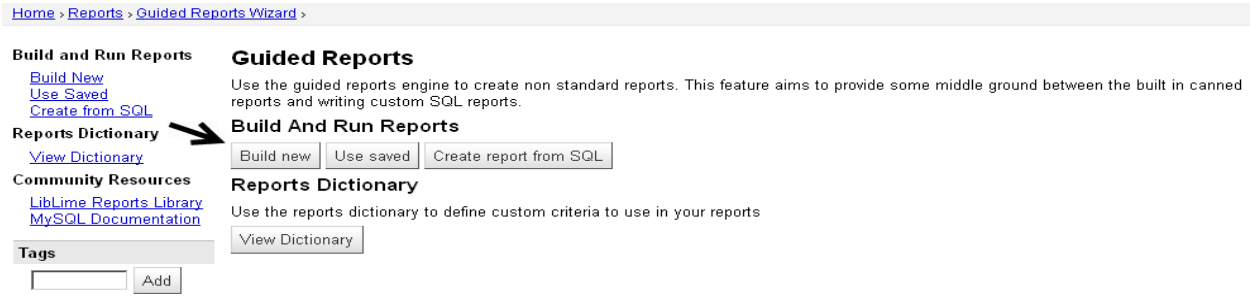
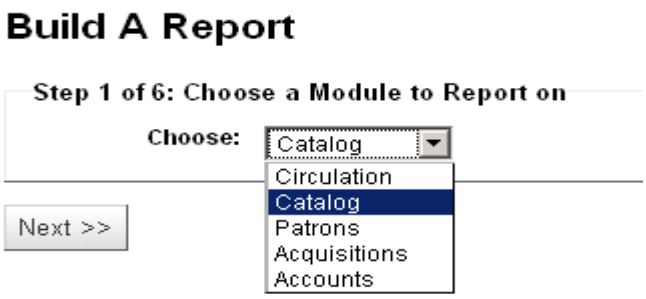
The guided report wizard is a limited but useful way to create reports if you don't know SQL or the table structure. It will walk you through various selection phases, with choices appropriate to each phase. At the end, you will save your report and then can run it at any time.

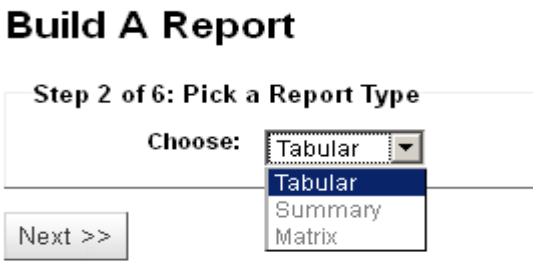
Under Reports, Guided Report Wizard, click Build New. (The Use Saved and Create From SQL buttons replicate functions from the main menu, covered below.)


Home › Reports › Guided Reports Wizard ›
Build and Run Reports
Build New
Use Saved
Create from SQL
Reports Dictionary
View Dictionary
Community Resources
LibLime Reports Library
MySQL Documentation
Tags
Add
Guided Reports
Use the guided reports engine to create non standard reports. This feature aims to provide some middle ground between the built in canned reports and writing custom SQL reports.
Build And Run Reports
Build new
Use saved
Create report from SQL
Reports Dictionary
Use the reports dictionary to define custom criteria to use in your reports
View Dictionary

The first step is to select a module for reporting:



Click Next. Almost always you will be reporting tabular data. The other options aren't available for most reports.



Click Next, and the third step shows tables and fields appropriate for the module you selected:

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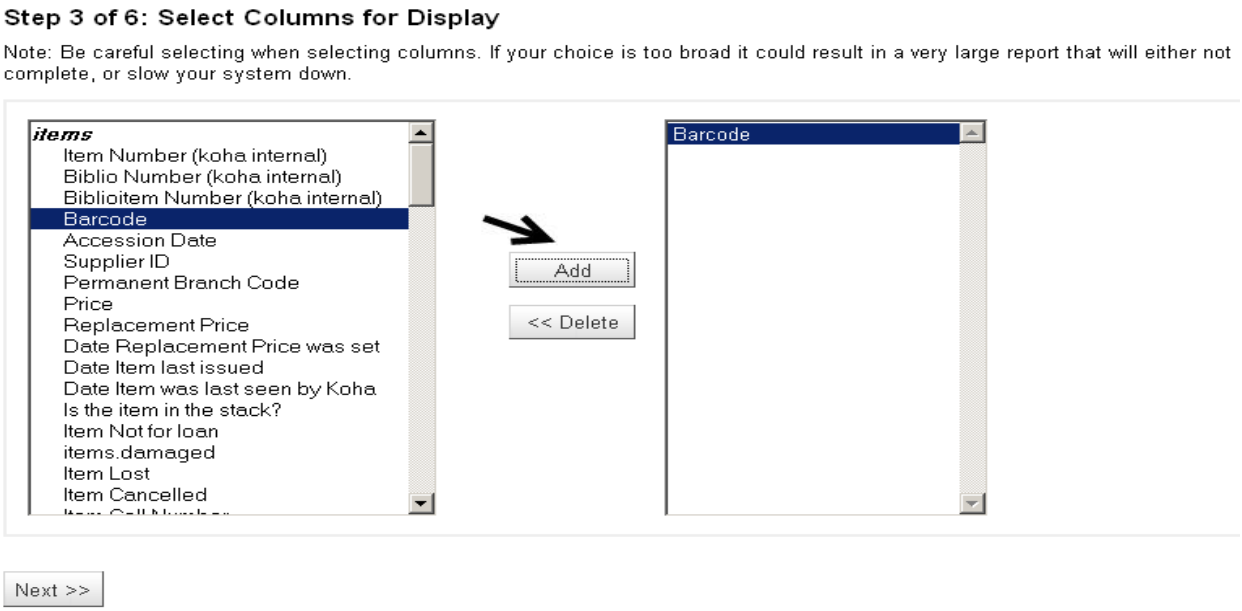
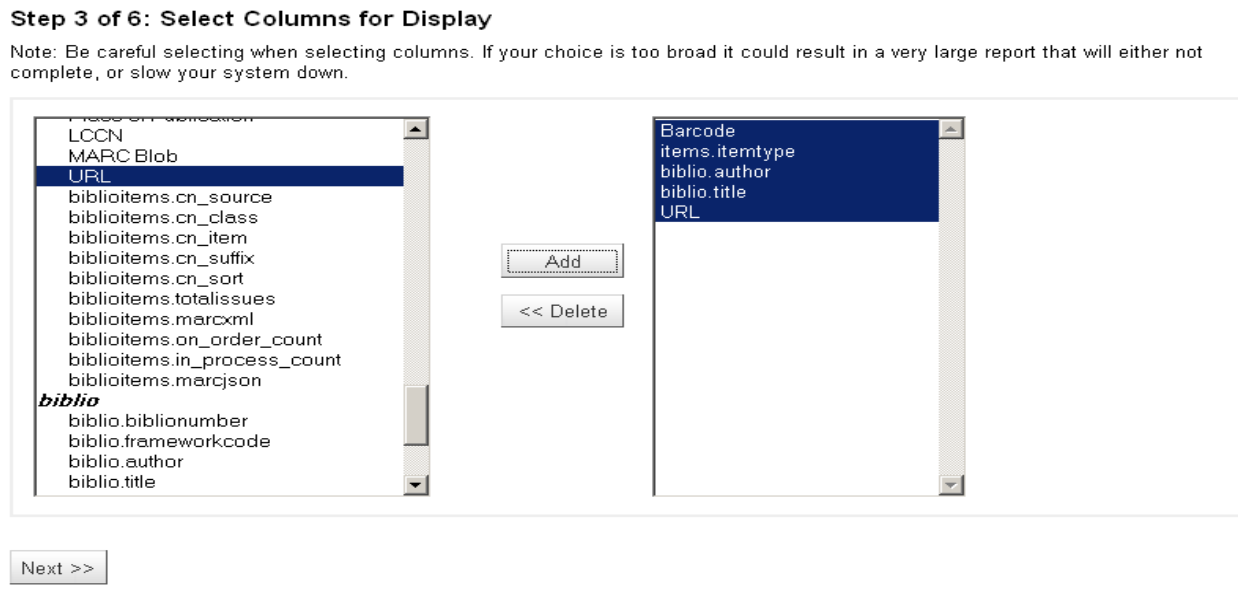

Step 3 of 6: Select Columns for Display
Note: Be careful selecting when selecting columns. If your choice is too broad it could result in a very large report that will either not complete, or slow your system down.
items
Item Number (koha internal)
Biblio Number (koha internal)
Biblioitem Number (koha internal)
Barcode
Accession Date
Supplier ID
Permanent Branch Code
Price
Replacement Price
Date Replacement Price was set
Date Item last issued
Date Item was last seen by Koha
Is the item in the stack?
Item Not for loan
items.damaged
Item Lost
Item Cancelled
Add
<< Delete
Barcode
Next >>

Find the fields you want in the left-hand box, select them (holding down CTRL will allow you to select multiple fields), then click Add to move them to the right-hand box. These are the fields that will be included in your report. Be sure to scroll down. In this example, the first set of fields are relevant to the item record, but further down are some fields for the title record.



The next screen will give you some options to limit your report – by item type, branch, lost value, shelving location, or collection code:

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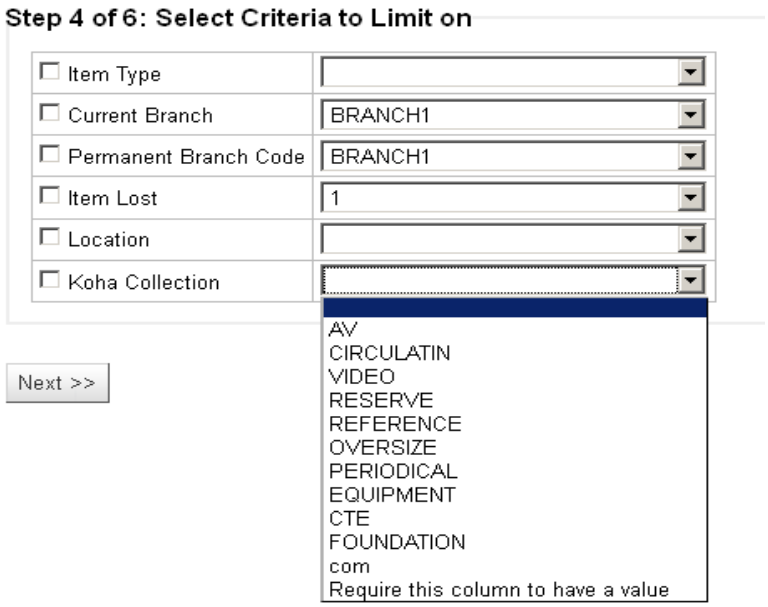
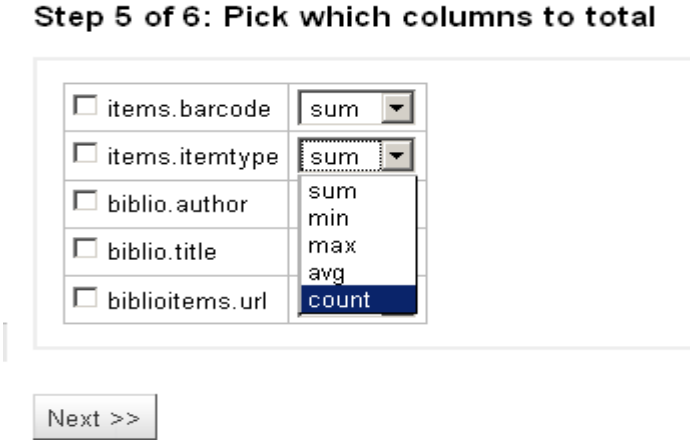


This sample report will be limited to item type of REFBOOK. The next screen is useful if you are running a report with fields that can be added, or you want to know how many occurrences of each selection there are. For example, you might want to count how many checkouts there have been, or how many items of each item type. Check the fieldname you want to count. You have different options, or you can ignore the selections entirely.



The last step lets you determine how the report output should be sorted. You can select a particular field, or leave everything unchecked.

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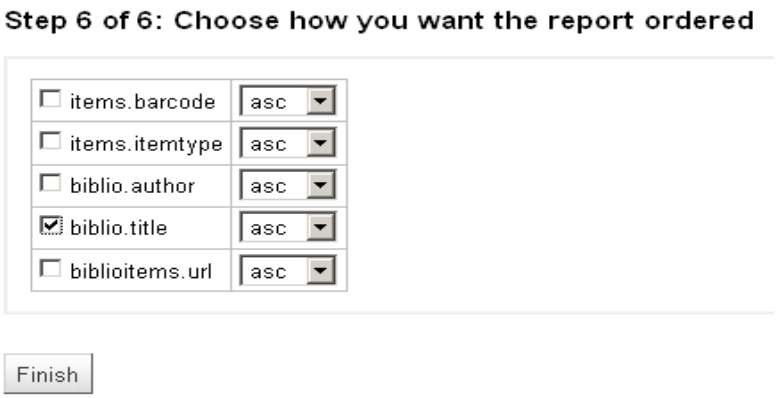
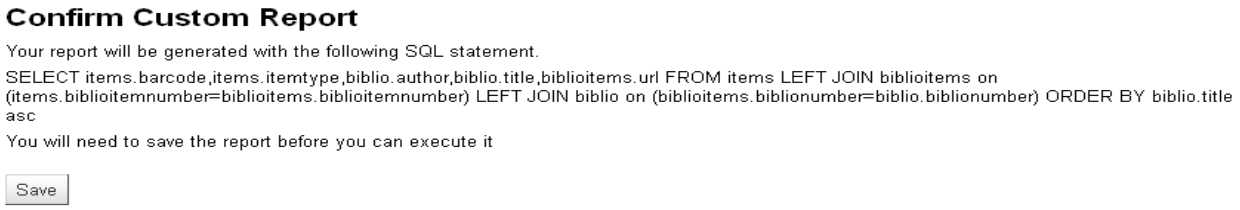
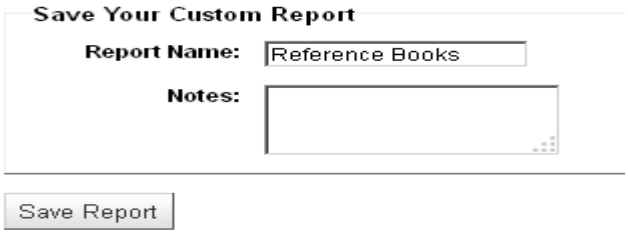


Your sort choices are ascending or descending (such as A-Z or Z-A). The final screen shows you the SQL statement that will produce the report you want.


Confirm Custom Report
Your report will be generated with the following SQL statement.
SELECT items.barcode,items.itemtype,biblio.author,biblio.title,biblioitems.url FROM items LEFT JOIN biblioitems on (items.biblioitemnumber=biblioitems.biblioitemnumber) LEFT JOIN biblio on (biblioitems.biblionumber=biblio.biblionumber) ORDER BY biblio.title asc
You will need to save the report before you can execute it
Save

You'll have to save it and give it a name:



Your report is then saved – you can run it by going to the Saved Reports list.

Your report has been saved
The report you have created has now been saved. You can now
Access this report from the: Saved Reports Page
Return to: Guided Reports

From the Saved Reports list, click the Run link at the end of the line to run the report.

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Saved Reports

All Saved Reports

Select an action Go

	Author	Report (click title to edit)	Date Created	Last Modified	
☐	Support, WALDO (13233)	bib count	02/18/2011	11/19/2013	Run
☐	LibLime, Demo (14367)	Bibs with no items	05/23/2012	06/26/2013	Run
☐	Admin, Koha PTFS (1)	Books in Call Number order	05/25/2010	09/25/2013	Run
☐	Admin, Koha PTFS (1)	By Order of Call Number 2	05/11/2010	05/25/2010	Run
☐	(0)	Collection code breakdown	05/11/2009	05/11/2009	Run
☐	LibLime, Demo (14367)	collstat	06/11/2013	06/11/2013	Run
☐	(2)	DVD and VHS checkouts	06/16/2009	06/16/2009	Run
☐	Support, WALDO (13233)	frameworkcode	02/18/2011	02/18/2011	Run
☐	LibLime, Demo (14367)	Items at X library	05/23/2012	09/06/2013	Run
☐	ptfs, ptfs (13375)	List new titles added since x date	06/07/2012	01/23/2013	Run
☐	ptfs, ptfs (13375)	Message Queue -- most recent first	12/03/2013	12/03/2013	Run
☐	(0)	new 30 days	05/12/2009	05/12/2009	Run
☐	ptfs, ptfs (13375)	Newly cataloged records	07/28/2010	07/29/2013	Run
☐	(2)	Overdue list	09/09/2009	09/27/2013	Run
☐	LibLime, Demo (14367)	Patron list	05/23/2012	09/06/2013	Run
☐	ptfs, ptfs (13375)	Patron list all	06/10/2013	08/27/2013	Run
☐	Admin, Koha PTFS (1)	Patrons w/ Fines	04/28/2010	04/29/2010	Run
☐	(0)	Problem items	06/01/2009	06/07/2012	Run
☐	(2)	Problem patrons	06/09/2009	01/23/2013	Run
☐	ptfs, ptfs (13375)	Reference Books	12/12/2013	12/12/2013	Run

Reference Books

Total number of rows matching the (unlimited) query is 3001.

<< < 1 2 3 ... 151 > >>

barcode	itemtype	author	title	url
37570000523323	REFBOOK		2008 Self-Study Report : Prepared for the Middle States Commission on Higher Education/	
37570000514231	REFBOOK		2008 writer's market:	
37570000479310	REFBOOK	Boll, William Charles.	A comparative analysis of criminal justice processes in South Africa and the United States /	
37570000107010	REFBOOK		A Guide to doing business with the Department of State.	
37570000023498	REFBOOK	Shemanski, Frances.	A guide to fairs and festivals in the United States /	
37570000135664	REFBOOK	Holman, C. Hugh	A handbook to literature.	
37570000483676	REFBOOK	Schama, Simon	A history of Britain /	http://www.loc.gov/catdir/toc/fy031/00061442.html
37570000535012	REFBOOK	Kaplin, William A.	A legal guide for student affairs professionals /	
37570000098540	REFBOOK		AAA road atlas :	
37570000354604	REFBOOK		Academic American encyclopedia.	
37570000354596	REFBOOK		Academic American encyclopedia.	

Clicking on the report name will open it in edit mode so you can modify the SQL, if needed.

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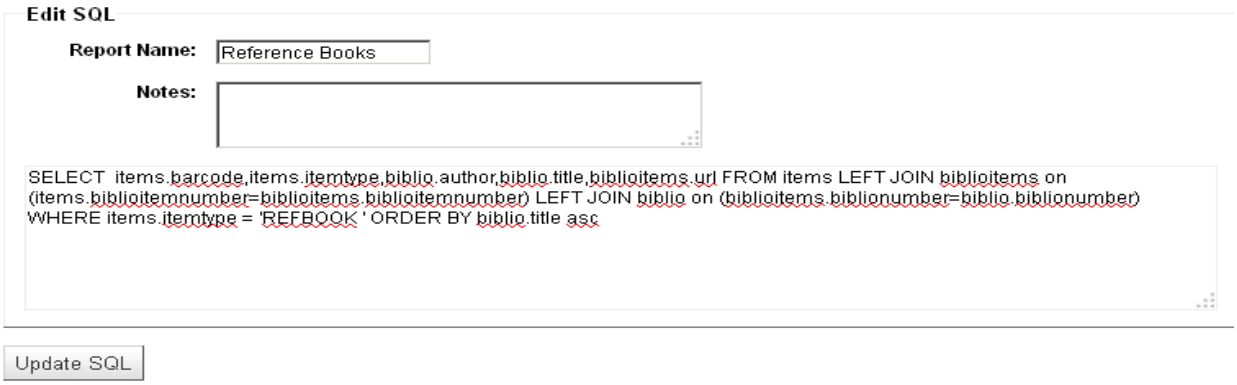
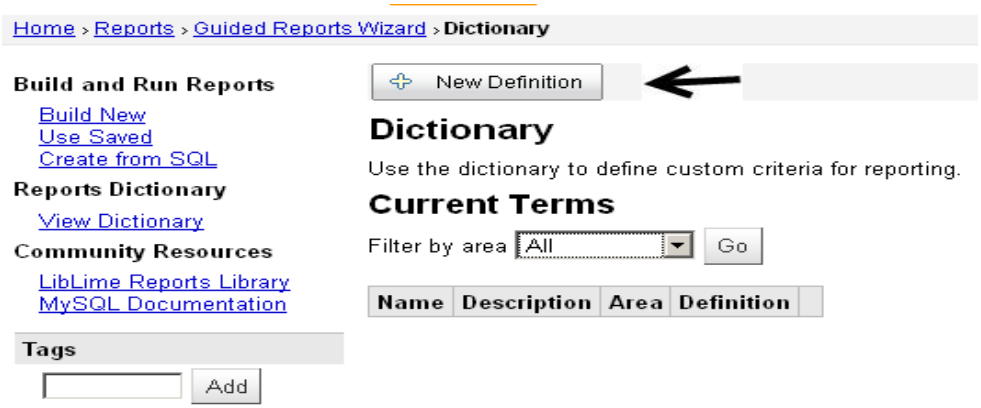

Edit SQL
Report Name:
Reference Books
Notes:
SELECT items.barcode,items.itemtype,biblio.author,biblio.title,biblioitems.url FROM items LEFT JOIN biblioitems on (items.biblioitemnumber=biblioitems.biblioitemnumber) LEFT JOIN biblio on (biblioitems.biblionumber=biblio.biblionumber) WHERE items.itemtype = 'REFBOOK ' ORDER BY biblio.title asc
Update SQL

8.1.1 Reports Dictionary

The Reports Dictionary lets you pre-define certain settings that you might use frequently. For example, in a university setting, you might need to report on all faculty. From the Reports menu, select View Dictionary, then create a new definition.



The first step is to give it a name and description:

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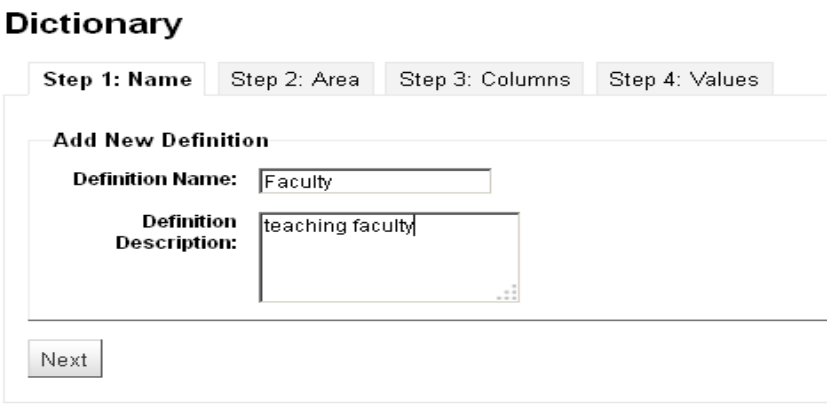
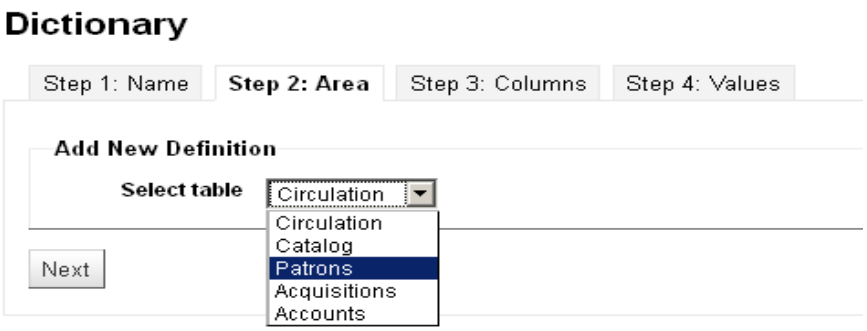
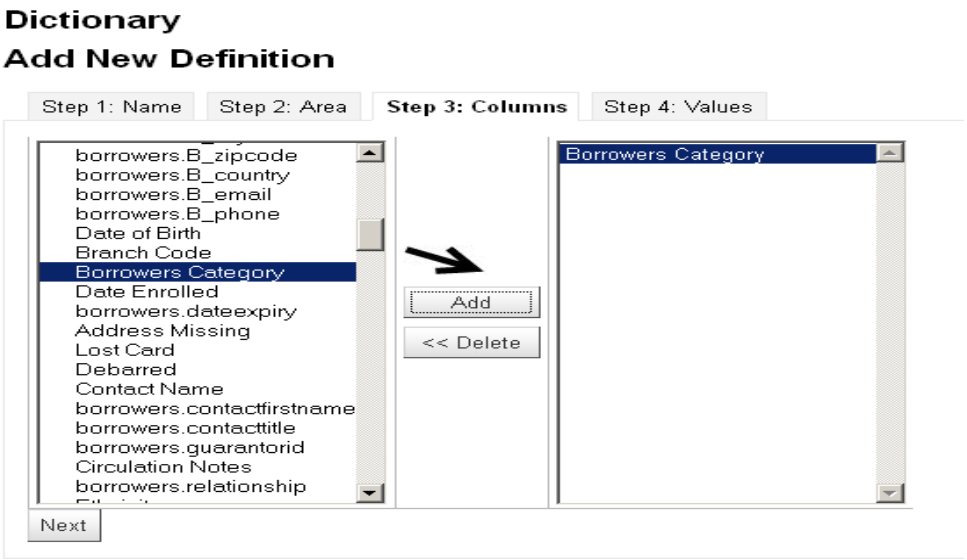


Click Next and Step 2 allows you to select the module:



In the third step, select the field that contains the values you want to select. Click Add to move it to the right-hand column.



In the fourth step, select the value you want for that field, and click Next.

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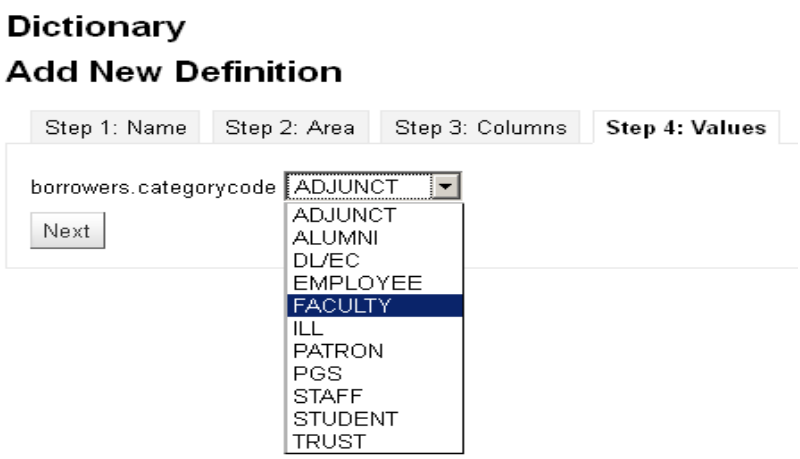
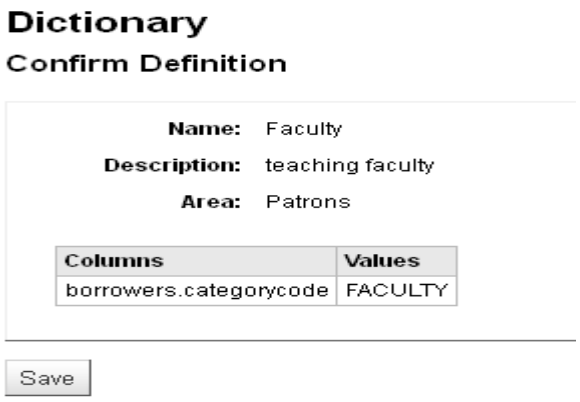
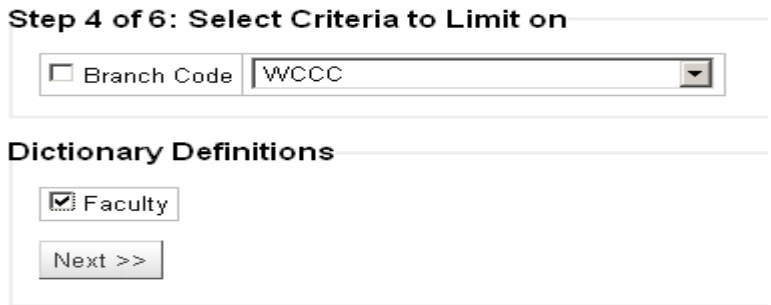


Confirm your settings and save the definition.



Now, if you use the guided report wizard to build a patron report, the definition will be available as a limiting option:



The limiter will be added into the SQL statement created by the wizard.

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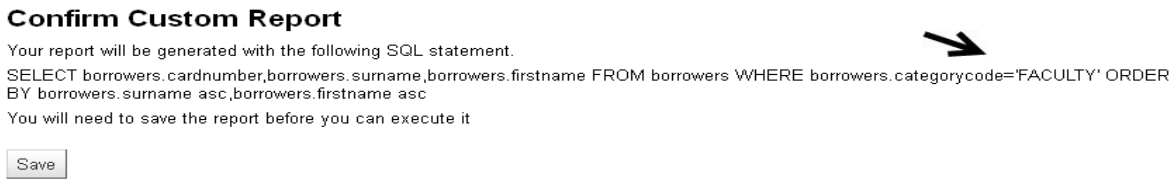
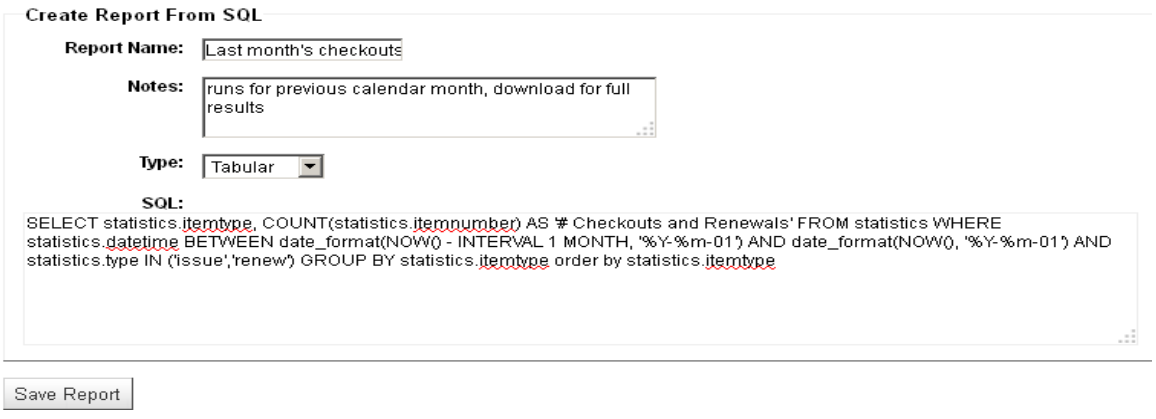

Confirm Custom Report
Your report will be generated with the following SQL statement.
SELECT borrowers.cardnumber,borrowers.surname,borrowers.firstname FROM borrowers WHERE borrowers.categorycode='FACULTY' ORDER BY borrowers.surname asc,borrowers.firstname asc
You will need to save the report before you can execute it
Save

8.2 Create from SQL

The guided report wizard is limited in what it can do. If you have some SQL expertise and learn the basic table structure, you can write your own queries from scratch. You will only be able to use the SELECT query and associated modifiers – you are not allowed to save reports that attempt to modify table data or do anything potentially harmful. The reports interface is for querying only.

From the main reports menu, click Create from SQL. That opens an edit screen where you can give your report a name and enter your SQL commands. For example, here is a report to count checkouts and renewals for the previous month, broken down by item type. Note the sliding date parameter. Rather than hardcoding a date, this setting will always run for the month previous to today's date.

```
SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and
Renewals' FROM statistics WHERE statistics.datetime BETWEEN
date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND
date_format(NOW(), '%Y-%m-01') AND statistics.type IN ('issue','renew')
GROUP BY statistics.itemtype order by statistics.itemtype
```


Create Report From SQL
Report Name:
Last month's checkouts
Notes:
runs for previous calendar month, download for full results
Type:
Tabular
SQL:
SELECT statistics.itemtype, COUNT(statistics.itemnumber) AS '# Checkouts and Renewals' FROM statistics WHERE statistics.datetime BETWEEN date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND date_format(NOW(), '%Y-%m-01') AND statistics.type IN ('issue','renew') GROUP BY statistics.itemtype order by statistics.itemtype
Save Report

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Save the report, find it on the list of saved reports, and run it. It can take a few tries to get your syntax right. Reports that use a GROUP BY setting may not display the full output to the screen; page links may display but not function. It's safest to download the output to be sure you see it all.

Total number of rows matching the (unlimited) query is 658.

<< < 1 2 3 ... 33 > >>

itemtype	# Checkouts and Renewals
ACADAPTER	658
ACCESSORY	13
AUDIOREC	44
BOOK	1671
BOOK2	247
BOOK24	10
BOOK4	68
BOOK7	3
BOOKNC	5
CALC	69
CAMCORDER	66
CASSETTE	5
CD	296
CD4	17
CD72	7
COMPKEYB	13
DRYBOARD	27
DVD	109
DVD4	22
EXTCORD	6

Download the report: Comma Separated Text Download

Click the Download button, and you can either save it as a .csv file or open it in Excel.

	A	B	C
34	MINISCORE	90	
35	MINISCORE4	9	
36	MOUSE	6	
37	MUSINSTSEM	3	
38	OVER	11	
39	PARTS	27	
40	PARTS4	6	
41	PERS2	476	
42	PERS24	3	
43	PERS4	98	
44	REF	1	
45	REMOTECTRL	7	
46	SC	15	
47	SCORE	445	
48	SCORE4	15	
49	SCORENC	18	
50	SCPT	197	
51	SCPTNC	1	
52	SURGE PROT	2	
53	THESIS	14	
54	TRIPOD	41	
55	VHS	5	
56	VHS4	1	
57	VIDEOGUIDE	2	
58	VSCORE	103	
59			

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In this case, there are 57 rows of data (plus the header) rather than the 20 visible in the reports interface.

8.2.1 Truncation

You can use the percent sign as a truncate for one or more characters. For example, if you have several item types beginning with BOOK (BOOK, BOOKREF, BOOKSPEC(, and you want to select them all, instead of a statement equals something, use a LIKE command:

WHERE itemtype LIKE 'BOOK%'

Putting a percent sign at the end picks up any item type starting with BOOK. If you also put it at the beginning:

WHERE itemtype LIKE '%BOOK%'

it would pick up any item type with BOOK somewhere in the name (such as EBOOK or REFBOOK).

8.2.2 Runtime Parameters

You will frequently want to change parameters for a report – perhaps run a count by different item types, or statistics by different patron categories. You can embed a runtime parameter in your saved SQL statement, so that the report asks for input when you run it. The syntax is the fieldname (in all caps) preceded and followed by two underscores, such as __ITEMTYPE__. Here's a sample query to count items added (grouped by call number) for a particular branch in the previous month:

```
SELECT items.homebranch, count(items.itemcallnumber) AS 'Count',
items.itemcallnumber FROM items WHERE items.dateaccessioned BETWEEN
date_format(NOW() - INTERVAL 1 MONTH, '%Y-%m-01') AND
last_day(NOW() - INTERVAL 1 MONTH) AND items.homebranch =
__HOMEBRANCH__ GROUP BY items.itemcallnumber ORDER BY
items.itemcallnumber asc
```


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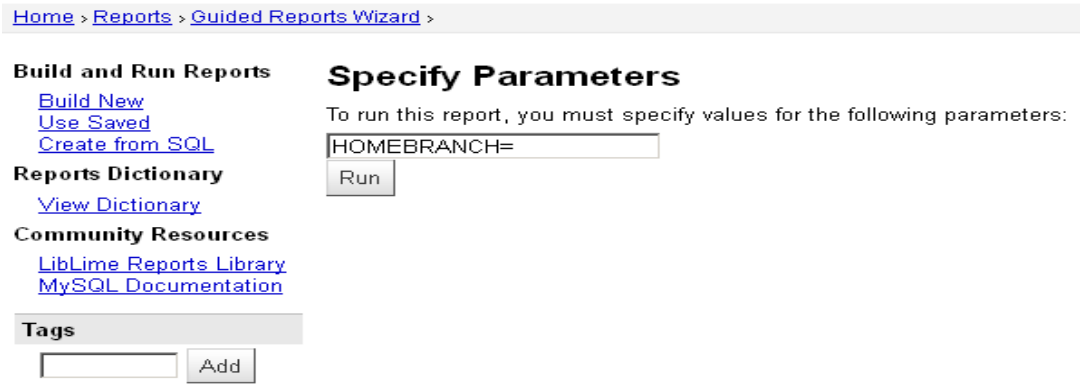
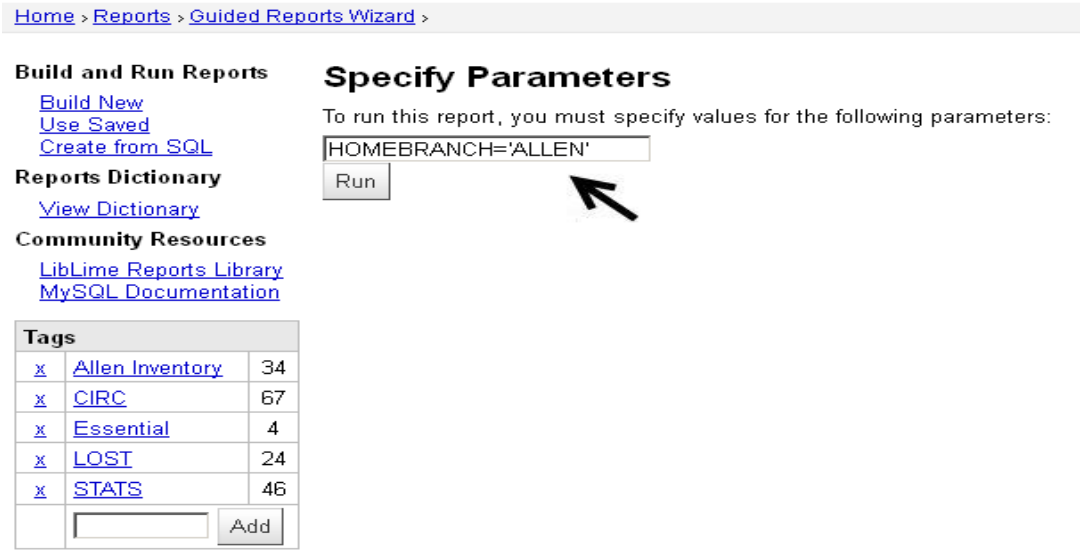
Create and save it as a saved SQL report. When you run the report, it brings up a screen asking for input:



Enter the branch code (not description), surrounded by single quote marks:



Then click Run and the report will execute the query with that parameter added into the other selections.

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homebranch	Count	itemcallnumber
ALLEN	1	GV1580 D351 T5
ALLEN	4	HEADPHONES KOSS
ALLEN	1	M1 A51 A v.48
ALLEN	1	M1 A51 A v.49
ALLEN	1	M1025 G96
ALLEN	1	M1025 V43
ALLEN	1	M1031 H41
ALLEN	1	M1206 R323 R34
ALLEN	1	M1495 N48
ALLEN	1	M1500 P87 D53 L38
ALLEN	1	M1508 S39 B35
ALLEN	1	M1530 B11 W37
ALLEN	1	M2 R29 C v.92
ALLEN	1	M2 R29 D v.60
ALLEN	1	M2020 B11 C26
ALLEN	1	M2020 B11 C30
ALLEN	1	M2020 B11 C6

8.2.3 Selecting on MARC Data

Most item fields and some from the title record are stored in separate tables and fields, such as items.itemcallnumber or biblio.title. However, the MARC record as a whole is stored in two fields; as a MARC-formatted blob in biblioitems.marc, and in XML format in biblioitems.marcxml. This means that it can be difficult to isolate and report particular MARC fields. You'll need to work with the ExtractValue() command. Here's a sample which pulls the 020a and the 245a:

```
SELECT ExtractValue(marcxml,
'//datafield[@tag="020"]/subfield[@code>="a"]') AS '020-ISBN',
ExtractValue(marcxml,  '//datafield[@tag="245"]/subfield[@code>="a"]') AS
'TITLE' FROM biblioitems WHERE ExtractValue(marcxml,
'//datafield[@tag="020"]/subfield[@code>="a"]') order by TITLE
```

Here's another sample, which pulls all the 650a entries and concatenates them. It has a runtime parameter for the item's home branch:

```
SELECT  biblio.title, biblio.author, ExtractValue(biblioitems.marcxml,
'//datafield[@tag="650"]/subfield[@code>="a"]') AS '650 Fields', items.barcode,
biblio.copyrightdate, items.itemtype, items.itemcallnumber, items.location,
items.ccode FROM items JOIN biblioitems on (items.biblioitemnumber =
biblioitems.biblioitemnumber) JOIN biblio on (items.biblionumber =
biblio.biblionumber) where items.homebranch = __HOMEBRANCHCODE__
ORDER BY items.cn_sort asc
```


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That report output looks like this:

Subject field entries

Total number of rows matching the (unlimited) query is 19488.

<< < 1 2 3 ... 975 > >>

title	author	650 Fields	barcode	copyrightdate	itemtype	itemcallnumber	location	ccode
ILL Material: Main Record	ILL Material		58999101		BOOK	Freemasons : a history and exploration of the world's oldest secret societ	CIRCULATING	CIRCULATIN
Zebra default					BOOK			
1984 :	Orwell, George,		37570000051713	1981	BOOK		CIRCULATING	CIRCULATIN
The American journal of nursing.		Nursing Periodicals. Nursing Periodicals.			PERIODICAL		PERIODICAL	PERIODICAL
Archaeology.		Archaeology Periodicals.			PERIODICAL		PERIODICAL	PERIODICAL
Art in America.		Art Periodicals.		1939	PERIODICAL		PERIODICAL	PERIODICAL
Bloomberg Businessweek.		Business Periodicals.			PERIODICAL		PERIODICAL	PERIODICAL
CMA today.		Medical assistants United States Periodicals. Allied health personnel United States Periodicals.		2003	PERIODICAL		PERIODICAL	PERIODICAL

When a title record is first created, the 245a is placed in the biblio.title field, and the first author is placed in the biblio.author field. For most queries, it's easier to use those fields rather than extracting the MARC fields. The above query uses biblio.title and biblio.author, but then extracts the 650 from the MARC data.

This syntax can be tricky to use – do some research on it.

8.3 Use Saved

Whether you create a report directly with SQL or use the guided reports wizard, your report is placed into the Saved Reports list. From the main reports menu, click Use Saved to see the list. You can click Run at the end of the entry to execute the report, or click on the report name to edit the SQL. You can also use the check boxes to perform actions on one or more reports. For example, to delete one or more reports, click the check box(es). Then, at the top, click the Select an Action pull-down. Choose delete and click Go, and the report(s) will be deleted.

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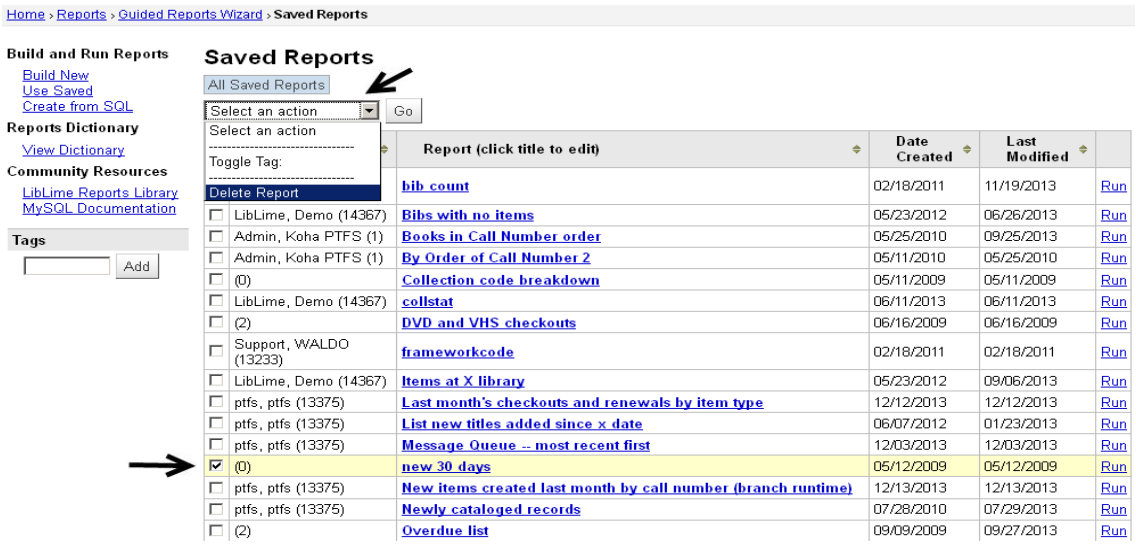
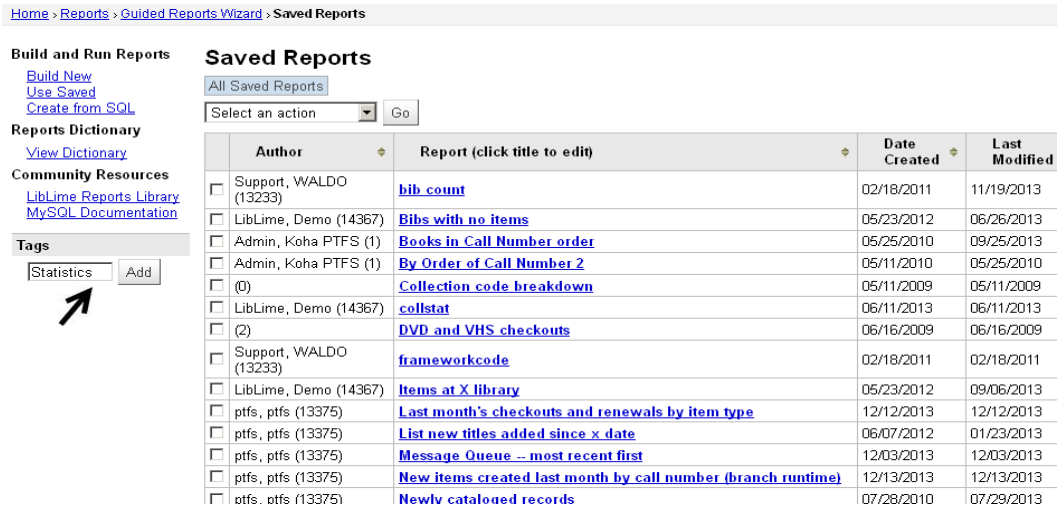

Home › Reports › Guided Reports Wizard › Saved Reports
Build and Run Reports
Build New
Use Saved
Create from SQL
Reports Dictionary
View Dictionary
Community Resources
LibLime Reports Library
MySQL Documentation
Tags
Add
Saved Reports
All Saved Reports
Select an action
Go
Select an action
Toggle Tag:
Delete Report
Report (click title to edit)
Date Created
Last Modified
bib count 02/18/2011 11/19/2013 Run
LibLime, Demo (14367) Bibs with no items 05/23/2012 06/26/2013 Run
Admin, Koha PTFS (1) Books in Call Number order 05/25/2010 09/25/2013 Run
Admin, Koha PTFS (1) By Order of Call Number 2 05/11/2010 05/25/2010 Run
(0) Collection code breakdown 05/11/2009 05/11/2009 Run
LibLime, Demo (14367) collstat 06/11/2013 06/11/2013 Run
(2) DVD and VHS checkouts 06/16/2009 06/16/2009 Run
Support, WALDO (13233) frameworkcode 02/18/2011 02/18/2011 Run
LibLime, Demo (14367) Items at X library 05/23/2012 09/06/2013 Run
ptfs, ptfs (13375) Last month's checkouts and renewals by item type 12/12/2013 12/12/2013 Run
ptfs, ptfs (13375) List new titles added since x date 06/07/2012 01/23/2013 Run
ptfs, ptfs (13375) Message Queue -- most recent first 12/03/2013 12/03/2013 Run
(0) new 30 days 05/12/2009 05/12/2009 Run
ptfs, ptfs (13375) New items created last month by call number (branch runtime) 12/13/2013 12/13/2013 Run
ptfs, ptfs (13375) Newly cataloged records 07/28/2010 07/29/2013 Run
(2) Overdue list 09/09/2009 09/27/2013 Run

Deletion cannot be undone, so check the reports to be sure you want to remove them.

8.3.1 Tags

You can also create tags and apply them to reports; this will help you organize and locate reports. It's especially useful on large, multi-library sites. For example, you could create a tag for each branch, then filter the report list to your branch's tag. Or you could organize reports by topic. In this case, I will create a tag for Statistics and click Add:


Home › Reports › Guided Reports Wizard › Saved Reports
Build and Run Reports
Build New
Use Saved
Create from SQL
Reports Dictionary
View Dictionary
Community Resources
LibLime Reports Library
MySQL Documentation
Tags
Statistics
Add
Saved Reports
All Saved Reports
Select an action
Go
Author
Report (click title to edit)
Date Created
Last Modified
Support, WALDO (13233) bib count 02/18/2011 11/19/2013
LibLime, Demo (14367) Bibs with no items 05/23/2012 06/26/2013
Admin, Koha PTFS (1) Books in Call Number order 05/25/2010 09/25/2013
Admin, Koha PTFS (1) By Order of Call Number 2 05/11/2010 05/25/2010
(0) Collection code breakdown 05/11/2009 05/11/2009
LibLime, Demo (14367) collstat 06/11/2013 06/11/2013
(2) DVD and VHS checkouts 06/16/2009 06/16/2009
Support, WALDO (13233) frameworkcode 02/18/2011 02/18/2011
LibLime, Demo (14367) Items at X library 05/23/2012 09/06/2013
ptfs, ptfs (13375) Last month's checkouts and renewals by item type 12/12/2013 12/12/2013
ptfs, ptfs (13375) List new titles added since x date 06/07/2012 01/23/2013
ptfs, ptfs (13375) Message Queue -- most recent first 12/03/2013 12/03/2013
ptfs, ptfs (13375) New items created last month by call number (branch runtime) 12/13/2013 12/13/2013
ptfs, ptfs (13375) Newly cataloged records 07/28/2010 07/29/2013

The tag is then available for use. I can select reports from the list and use the Select an Action pull-down to apply the tag.

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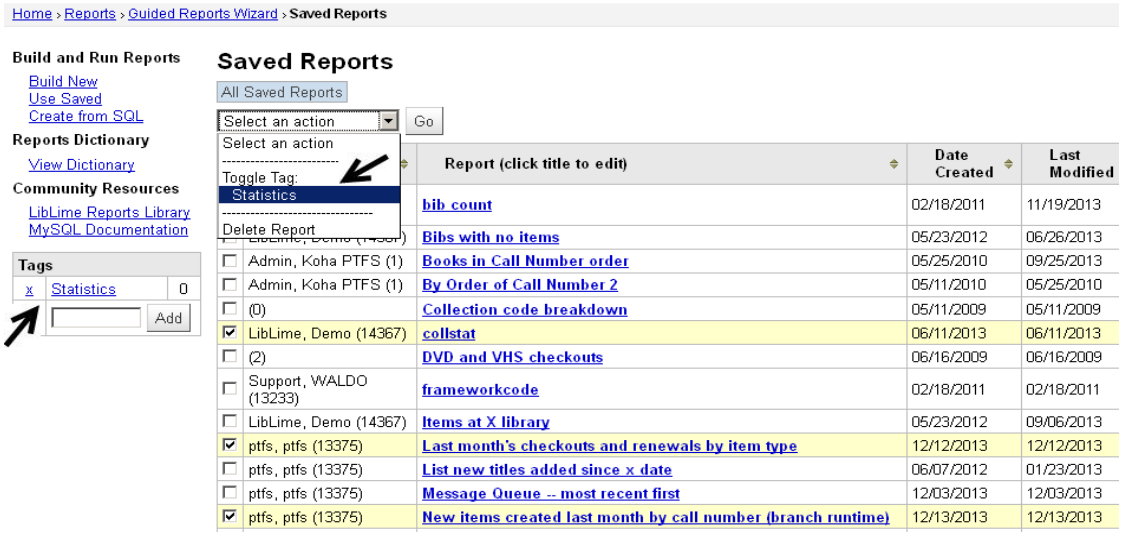
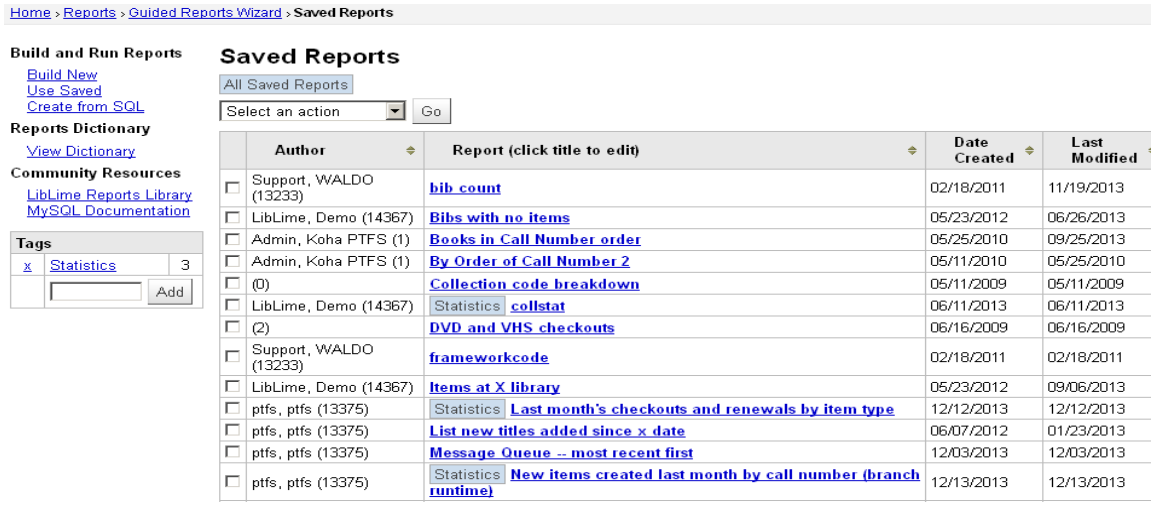
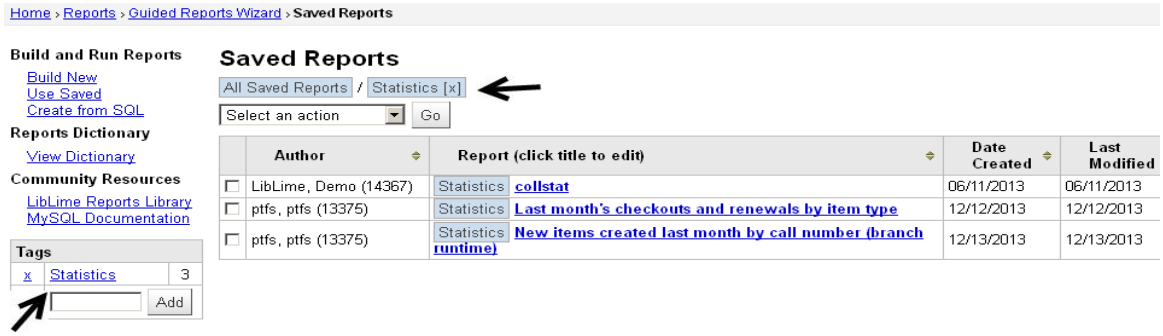

Home › Reports › Guided Reports Wizard › Saved Reports
Build and Run Reports
Build New
Use Saved
Create from SQL
Reports Dictionary
View Dictionary
Community Resources
LibLime Reports Library
MySQL Documentation
Tags
x Statistics 0
Add
Saved Reports
All Saved Reports
Select an action
Go
Select an action
Toggle Tag:
Statistics
Delete Report
Author
Report (click title to edit)
Date Created
Last Modified
bib count 02/18/2011 11/19/2013
Bibs with no items 05/23/2012 06/26/2013
Admin, Koha PTFS (1) Books in Call Number order 05/25/2010 09/25/2013
Admin, Koha PTFS (1) By Order of Call Number 2 05/11/2010 05/25/2010
(0) Collection code breakdown 05/11/2009 05/11/2009
LibLime, Demo (14367) collstat 06/11/2013 06/11/2013
(2) DVD and VHS checkouts 06/16/2009 06/16/2009
Support, WALDO (13233) frameworkcode 02/18/2011 02/18/2011
LibLime, Demo (14367) Items at X library 05/23/2012 09/06/2013
ptfs, ptfs (13375) Last month's checkouts and renewals by item type 12/12/2013 12/12/2013
ptfs, ptfs (13375) List new titles added since x date 06/07/2012 01/23/2013
ptfs, ptfs (13375) Message Queue -- most recent first 12/03/2013 12/03/2013
ptfs, ptfs (13375) New items created last month by call number (branch runtime) 12/13/2013 12/13/2013

The tag is then visible next to the report title:


Home › Reports › Guided Reports Wizard › Saved Reports
Build and Run Reports
Build New
Use Saved
Create from SQL
Reports Dictionary
View Dictionary
Community Resources
LibLime Reports Library
MySQL Documentation
Tags
x Statistics 3
Add
Saved Reports
All Saved Reports
Select an action
Go
Author
Report (click title to edit)
Date Created
Last Modified
Support, WALDO (13233) bib count 02/18/2011 11/19/2013
LibLime, Demo (14367) Bibs with no items 05/23/2012 06/26/2013
Admin, Koha PTFS (1) Books in Call Number order 05/25/2010 09/25/2013
Admin, Koha PTFS (1) By Order of Call Number 2 05/11/2010 05/25/2010
(0) Collection code breakdown 05/11/2009 05/11/2009
LibLime, Demo (14367) Statistics collstat 06/11/2013 06/11/2013
(2) DVD and VHS checkouts 06/16/2009 06/16/2009
Support, WALDO (13233) frameworkcode 02/18/2011 02/18/2011
LibLime, Demo (14367) Items at X library 05/23/2012 09/06/2013
ptfs, ptfs (13375) Statistics Last month's checkouts and renewals by item type 12/12/2013 12/12/2013
ptfs, ptfs (13375) List new titles added since x date 06/07/2012 01/23/2013
ptfs, ptfs (13375) Message Queue -- most recent first 12/03/2013 12/03/2013
ptfs, ptfs (13375) Statistics New items created last month by call number (branch runtime) 12/13/2013 12/13/2013

If you click on the tag in the left-hand list, only reports with that tag will show:


Home › Reports › Guided Reports Wizard › Saved Reports
Build and Run Reports
Build New
Use Saved
Create from SQL
Reports Dictionary
View Dictionary
Community Resources
LibLime Reports Library
MySQL Documentation
Tags
x Statistics 3
Add
Saved Reports
All Saved Reports / Statistics [x]
Select an action
Go
Author
Report (click title to edit)
Date Created
Last Modified
LibLime, Demo (14367) Statistics collstat 06/11/2013 06/11/2013
ptfs, ptfs (13375) Statistics Last month's checkouts and renewals by item type 12/12/2013 12/12/2013
ptfs, ptfs (13375) Statistics New items created last month by call number (branch runtime) 12/13/2013 12/13/2013

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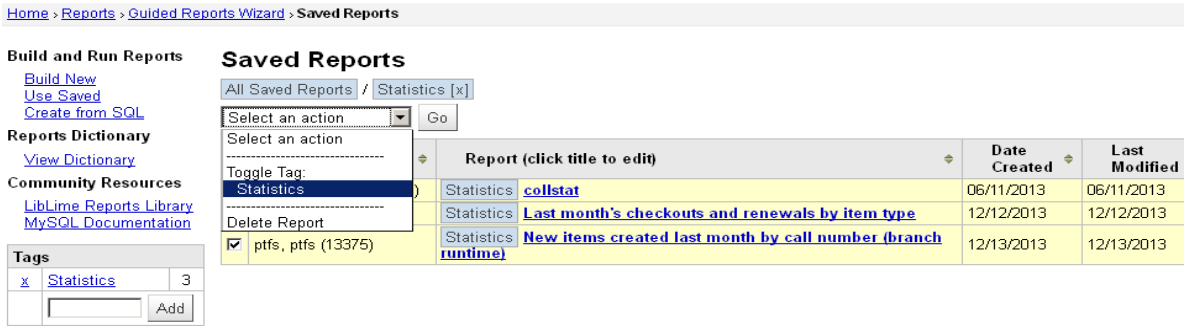
The top of the reports list shows the filter currently in use; click the [x] next to it to remove the filter and see the entire list again.

You can remove the tag from the report by clicking the checkbox, then using the Select an Action pull-down to toggle the tag:



8.4 Sample Report Library

LibLime maintains a library of sample SQL reports at:

http://cdn.kohalibrary.com/c/Docs/LibLimeSampleReports.htm

This document is updated as new reports are requested or table schema changed; there's a link to it on the Reports main menu page.

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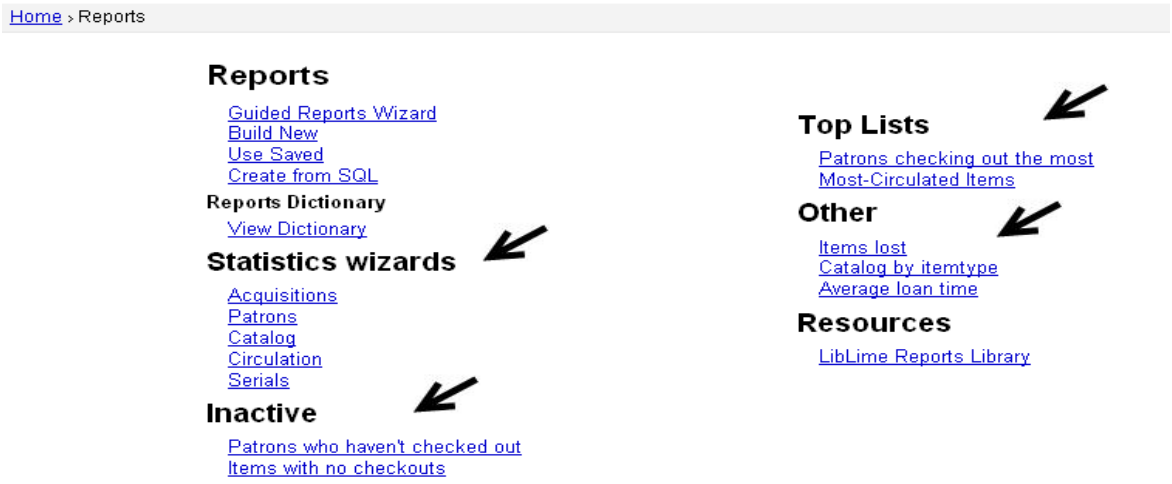
8.5 Canned and Statistical Reports

There are several generic reports available from the main reports menu, and several statistical wizards. These can provide general information but cannot be altered beyond the setup options included. In some cases, a more targeted SQL query might be better. Some of these reports are obsolete and will be removed in a future version.



8.5.1 Items with No Checkouts

This report can identify items that have never been checked out. The initial setup screen gives options for selecting by branch and item type:

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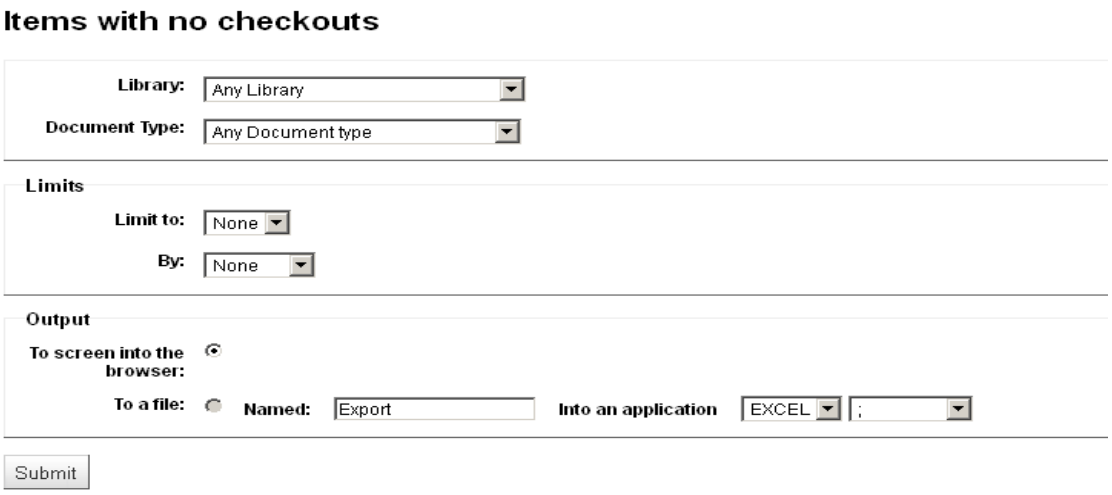

The report output lists materials with no recorded checkouts. If you leave the default "none" as the limit option, it will list everything. Otherwise, you can set a value from 5 to 1,000 for number of items on the list.

Items with no checkouts

Filtered on
Branch = WCCC
Doc Type = BOOK

Summary

Group	Call Number Range	Number of Items Displayed	Total Items in Group
NULL	Z7964.D44B96 1986 to	7899	
TOTAL		**7899**	**0**

NULL

#	Call Number	Barcode	Item Details
1	Z7964.D44B96 1986	37570000152750	Women in the Third World : Byrne, Pamela R. at WCCC
2	Z721.P47 2005	37570000515378	Perceptions of libraries and information resources: at WCCC
3	Z699.3.H66	37570000175173	The Library and information manager's guide to online services / Hoover, Ryan E. at WCCC
4	Z683.F43 1986	37570000069566	Fees for library service : at WCCC
5	Z675.J8P4776 1980	37570000069574	Personnel & materials guidelines for learning resources programs in community colleges / at WCCC
6	Z6.D57 1982	37570000038793	The book before printing : Diringer, David, at WCCC
7	Z478.6.P5W64 1988	37570000029875	The book culture of a colonial American city :

8.5.2 Patrons Checking Out the Most

This report will list patrons who have been the most active in the specified time period. The setup screen gives options for date ranges, branch, item type, and patron category:

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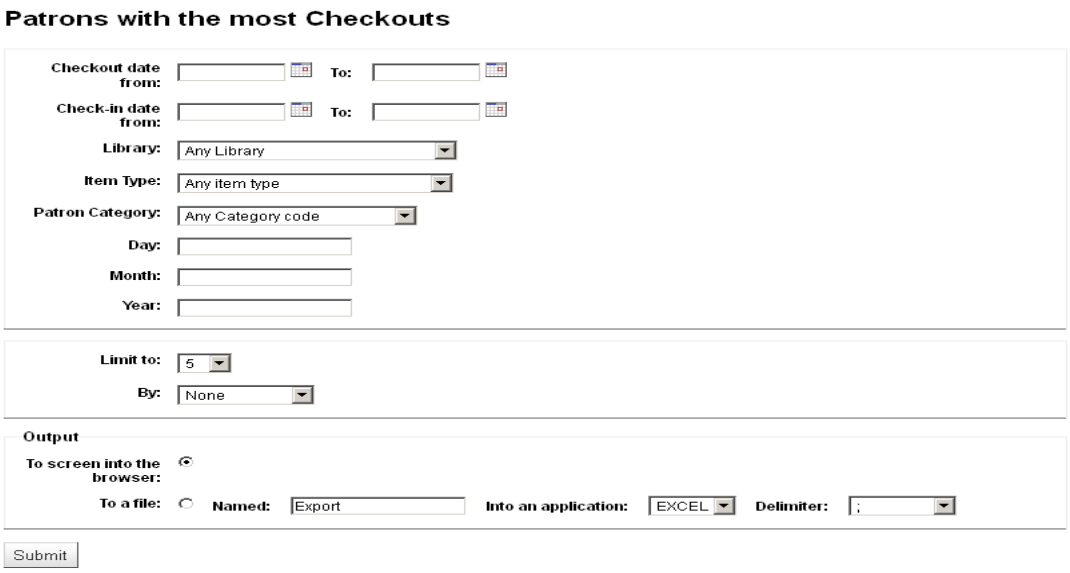

The output lists the patrons and their counts:

Top 5 List patrons for Checkouts

Filtered on
Issue From =01/01/2010
Issue To =01/01/2011
Bor Cat =FACULTY

Rank	Patron	Issues count
1	Degnan, Paul F.	30
2	Wilson-Soga, Nancy	16
3	Antonelli, Lori A.	12
4	Hillyer, Karen	8
5	McMahon, Elizabeth	6
6	Frabizio, Kerry	4
7	Podstupka King, Lori	4
8	Troy, Lisa	4
9	Sprow, Madeline	3
10	Tettemer, Stephanie P.	3
11	Ward, BJ	2
12	Cartine, Harvey	1
13	Phillips, Joseph T. IV	1

8.5.3 Most-Circulated Items

This report is similar to the patrons with the most checkouts, except it is by item. The setup is the same (select by date range, branch, item type, patron category).

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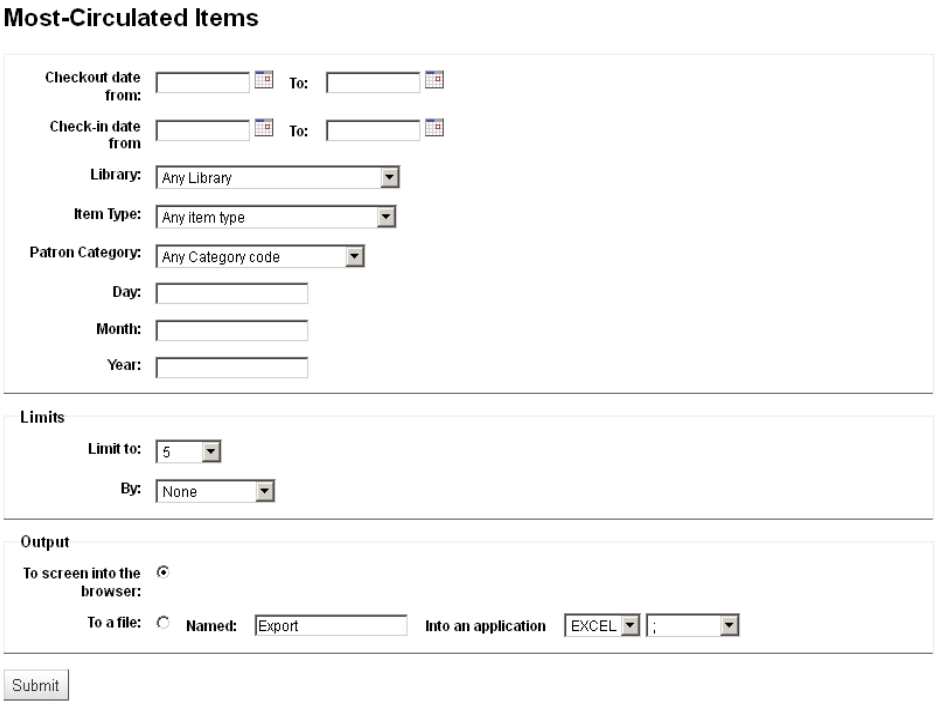

The report output lists the items and the number of checkouts:

Top 5 Most-Circulated Items

Filtered on
Issue From =01/01/2010
Issue To =01/01/2011

Rank	Global	
	Item	Count of Checkouts
1	Headset	420
2	TI-89 Graphing Calculator	278
3	Bergey's manual of determinative bacteriology /	143
4	Precalculus /	105
5	Basic Mathematics: Annotated Instructor's Edition /	97

8.5.4 Items Lost

This report lists items that have been marked lost. The setup menu has options to limit by library, item type, or particular lost status, and an option to sort.

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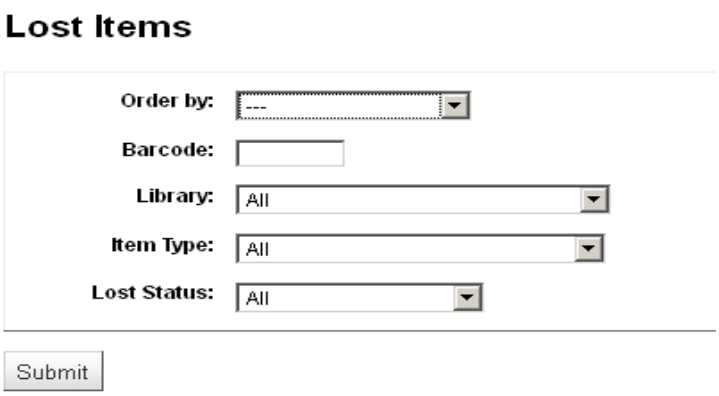

The report output gives details about the title and item.

Lost Items

360 lost items found

Title	Author	Lost Code	Barcode	Date last seen	Price	Rep.Price	Library	Itemtype	Holdingbranch	Location	Notes
10,000 ideas for term papers, projects, and reports /	Lamm, Kathryn.		37570000156041	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
101 tips for scoring high on the LSAT /	Martinson, Thomas H.		37570000154806	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
1984 :	Orwell, George,		37570000051713	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
21st century earth :			37570000304856	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
A basic guide for valuing a company /	Yegge, Wilbur M.		37570000487545	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
A book of scripts.	Fairbank, Alfred J.		37570000195973	2009-05-29			WCCC	BOOK	WCCC	CIRCULATING	
A brief guide to biology /	Krogh, David,		37570000537778	2009-12-07			WCCC	RSBOOK	WCCC	RESERVE	
A celebration or											

8.5.5 Catalog by Itemtype

This report gives a count of items by item type. You can either limit to a particular branch, or run for the entire database.

The output is a breakdown with counts.

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Reports on item types

Item type	count
Audio Books	167
Book	14481
Calculator	157
Compact disk	5
DVD (Digital Video Disc)	197
Equipment	26
Periodical	101
Reference Book (non-circulating)	3001
Reserve Book	294
Reserve DVD	211
Reserve Video	356
Video cassette	472
TOTAL	**19468**

8.5.6 Statistics Wizards

The statistics wizards (Patrons, Catalog, Circulation, Serials) are for doing counts on various combinations of data. They have different setup screens, with options appropriate to the module, but you must always select a row and column for the reports to work. Disregard the option "Acquisitions"; the statistics for acquisitions are done within the acquisitions module.

To use one of the wizards, decide what data you need. For example, the circulation statistics wizard is most commonly used for checkout statistics.

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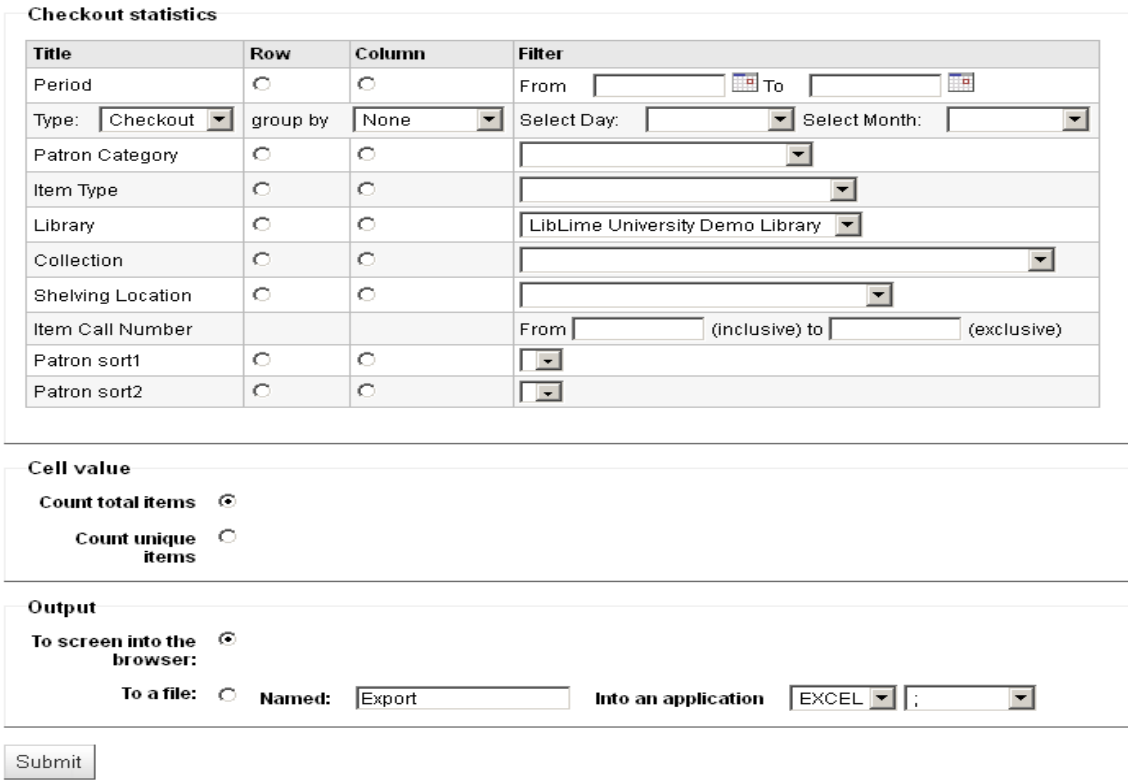
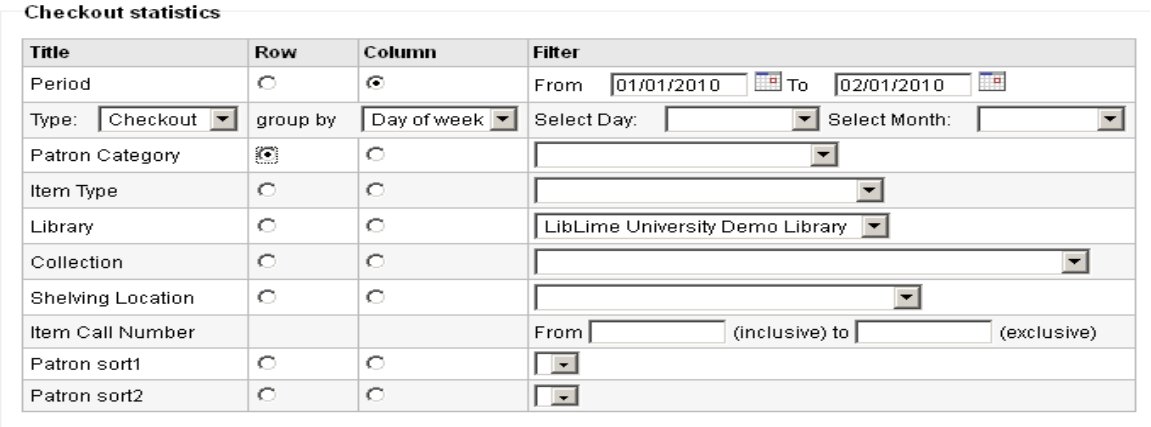


Set a date range – note that you should use from the first day of the month to the first day of the next month, not the last day of the month, because of the way the script is calculating dates. Then decide what other selections you need, such as a breakdown of checkouts by patron category. You can set other limiters such as branchcode or item type.



Remember that you MUST set both a row and column. The results show the breakdown you specified:

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Checkout statistics

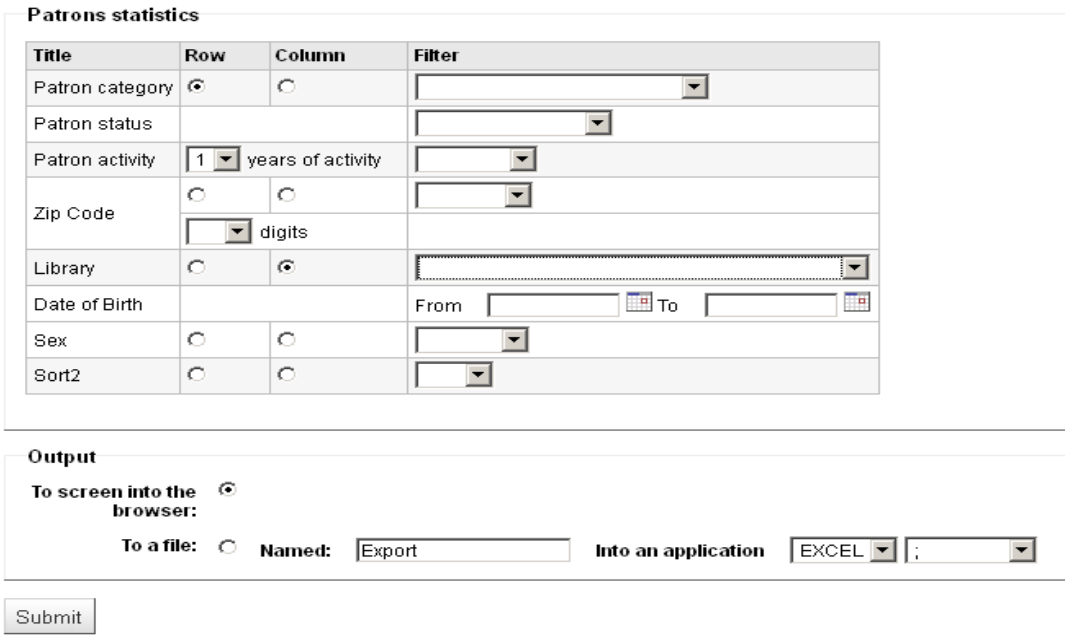
Filtered on

Period From 01/01/2010
Period To 02/01/2010
Library = WCCC
Event issue
Display by 1

borrowers.categorycode / datetime	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	TOTAL
Adjunct Faculty	1	6	8	4	3	2	24
Alumni Patron	0	0	0	0	0	0	0
DEPARTMENT LIBRARY-EC	0	0	0	0	0	0	0
Employee	0	0	0	0	0	0	0
Full-Time Faculty	0	3	1	0	0	0	4
InterLibrary Loan	0	6	0	0	2	0	8
Public Patron	0	1	19	5	8	0	33
Post Graduate Students	0	0	0	0	0	0	0
Staff	1	0	1	6	0	0	8
Student	37	43	166	89	31	27	393
Board of Trustees	0	0	0	0	0	0	0
TOTAL	**39**	**59**	**195**	**104**	**44**	**29**	**470**

Since you cannot save settings, you must recreate your report each time you run it. It's generally easier to develop a saved SQL report for the statistics you need regularly, so that you can reuse it.

The patron statistics wizard can give you breakdowns by patron options. For example, how many patron in the various patron categories by branch:



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Patrons statistics

Filtered on

Branches = BRANCH1 East WCCC

(line, column) = (categorycode,branchcode)

%cathash = Adjunct Faculty (ADJUNCT), Alumni Patron (ALUMNI), DEPARTMENT LIBRARY-EC (DL/EC), Employee (EMPLOYEE), Full-Time Faculty (FACULTY), InterLibrary Loan (ILL), Juvenile (JUV), Public Patron (PATRON), Post Graduate Students (PGS), Staff (STAFF), Student (STUDENT), Board of Trustees (TRUST)

Query = SELECT distinctrow categorycode FROM borrowers WHERE categorycode IS NOT NULL order by categorycode

Query = select distinctrow branchcode from borrowers where branchcode is not null order by branchcode

Query = SELECT categorycode, branchcode, count(*) FROM borrowers WHERE 1 group by categorycode, branchcode

categorycode / branchcode	BRANCH1	WCCC	TOTAL
Adjunct Faculty (ADJUNCT)		293	293
Alumni Patron (ALUMNI)		82	82
DEPARTMENT LIBRARY-EC (DL/EC)		3	3
Employee (EMPLOYEE)		67	67
Full-Time Faculty (FACULTY)		32	32
InterLibrary Loan (ILL)		3	3
Public Patron (PATRON)		646	646
Post Graduate Students (PGS)		1	1
Staff (STAFF)		56	56
Student (STUDENT)	2	7339	7341
Board of Trustees (TRUST)		2	2
TOTAL	**2**	**8524**	**8526**

9. Cataloging

A new Cataloging Module called the Cataloging Editor replaces the legacy MARC editing features in previous versions. The Cataloging Editor is a feature rich, single screen cataloging editor to support the creation/edit/deletion of bibliographic records, holdings records, and authority records, all following the MARC21 cataloging rules.

9.1 Opening the Cataloging Editor

To open the Cataloging editor, you can either click on Open Cataloging Editor from the Home page of the staff client, or go under the More menu and select Cataloging Editor.

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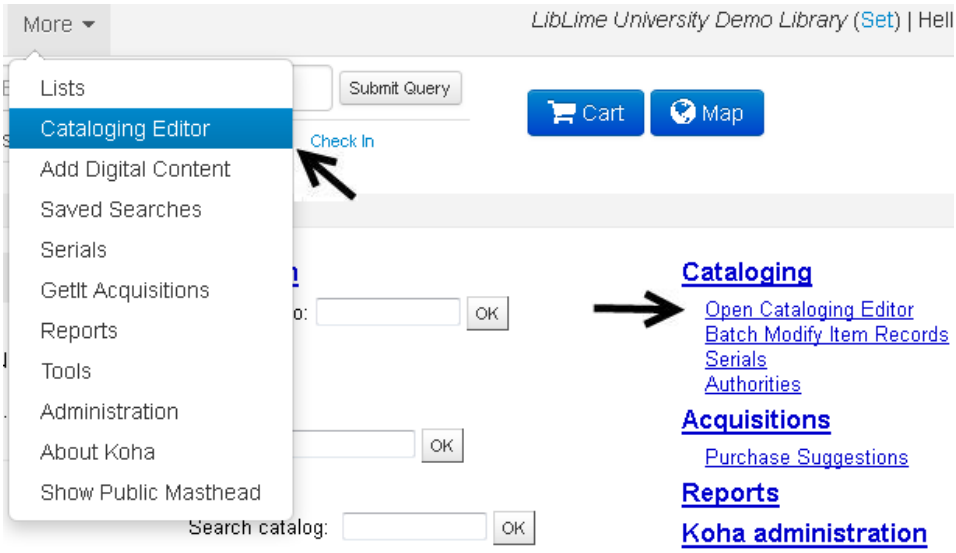
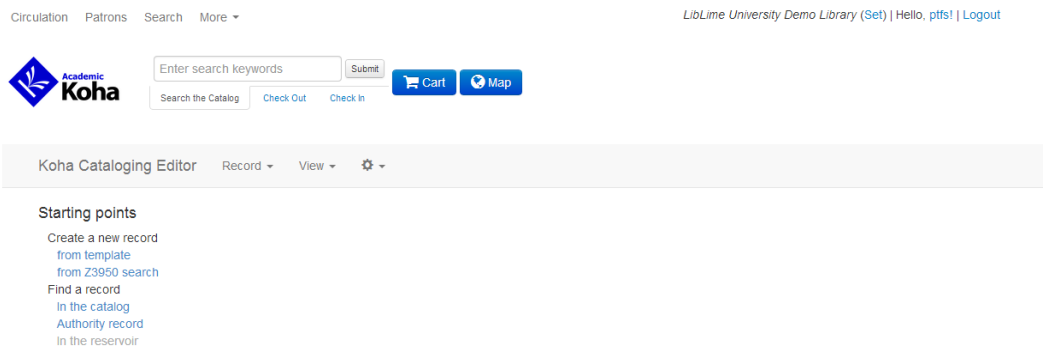


When the Cataloging Editor is launched, it gives you options for creating or searching for records:



9.2 Creating Bibliographic Records

9.2.1 Searching for Existing Bibliographic Records

From Starting Points choose “Find a record in catalog”

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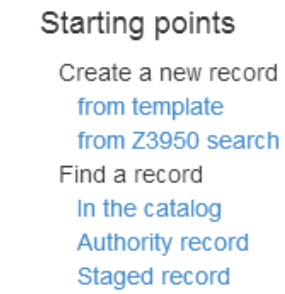
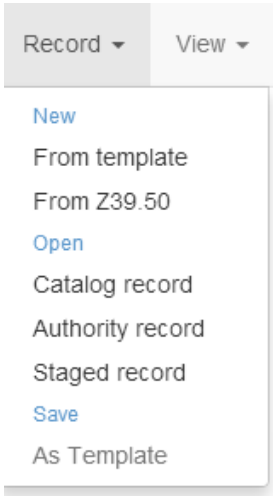
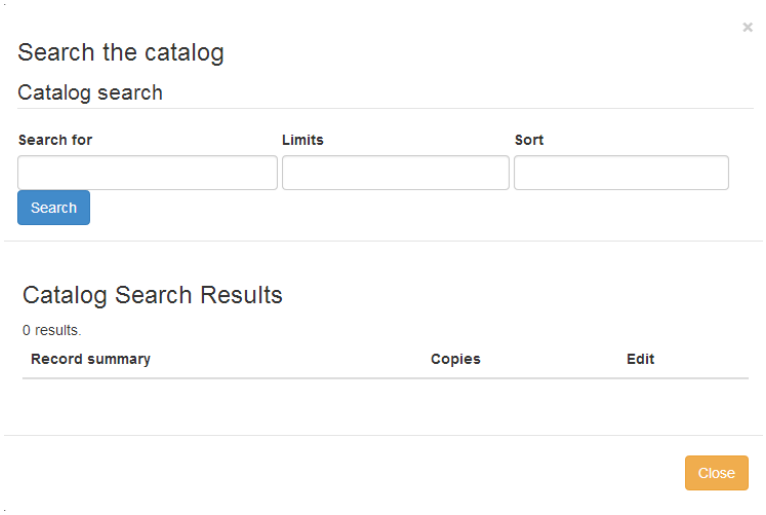


OR use the option “Record” atop the Cataloging Editor and choose “Open, Catalog Record” from options provided.



Enter desired search term(s) in search box provided; click enter to submit search. Sites with knowledge of JSON encoding and search indexes can customize the indexes available in the pulldown in the MarcEditorConfig syspref.



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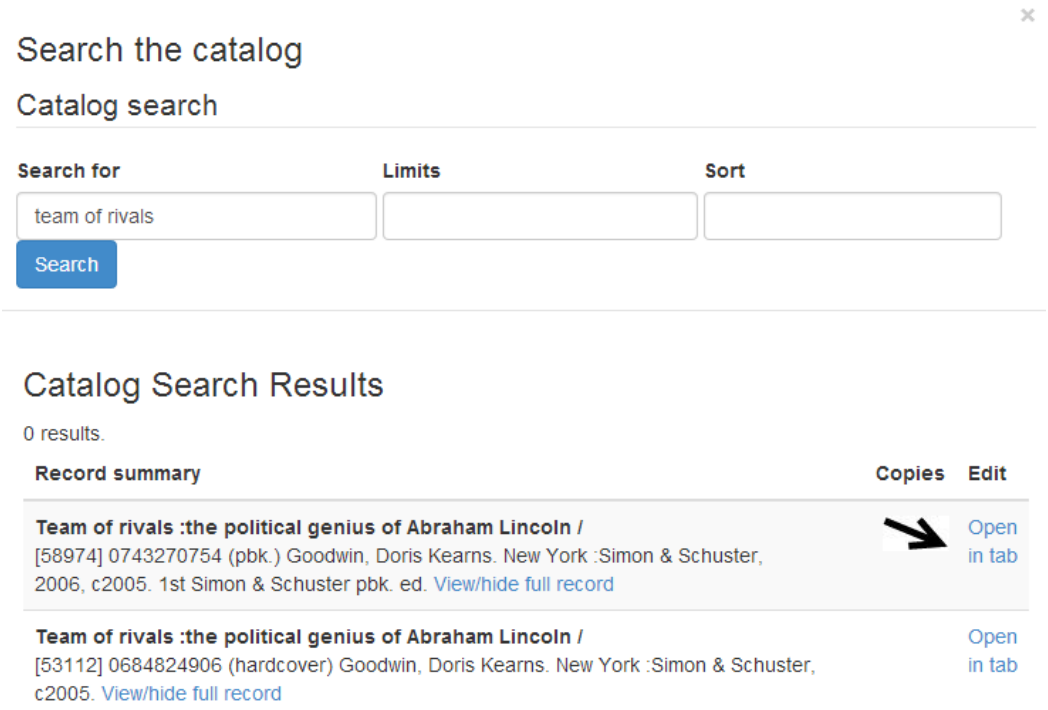
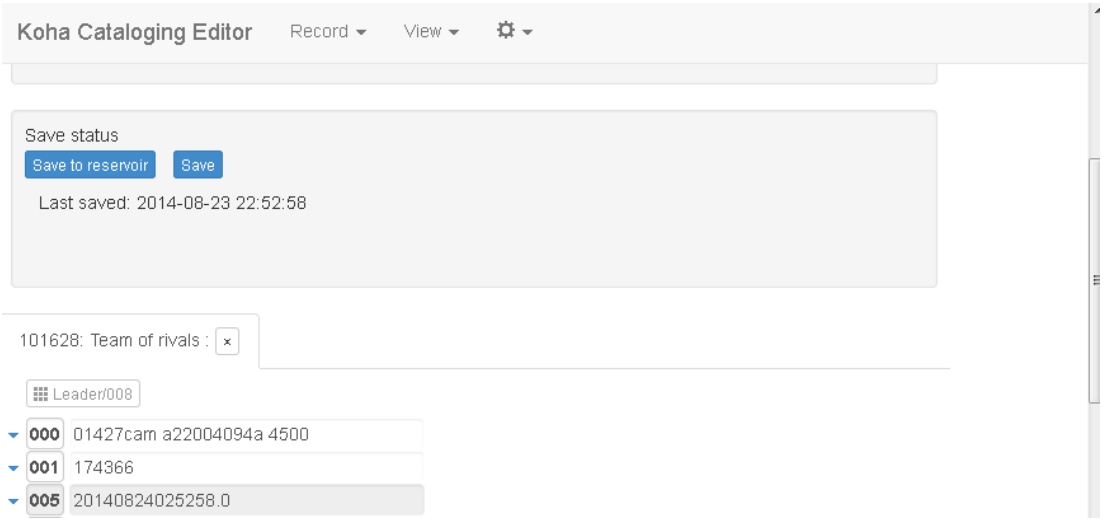
Search results will display within the pop-up box; choose the record you want and click the Open in Tab link:


Search the catalog
Catalog search
Search for
Limits
Sort
team of rivals
Search
Catalog Search Results
0 results.
Record summary
Copies
Edit
Team of rivals :the political genius of Abraham Lincoln /
[58974] 0743270754 (pbk.) Goodwin, Doris Kearns. New York :Simon & Schuster, 2006, c2005. 1st Simon & Schuster pbk. ed. View/hide full record
Open in tab
Team of rivals :the political genius of Abraham Lincoln /
[53112] 0684824906 (hardcover) Goodwin, Doris Kearns. New York :Simon & Schuster, c2005. View/hide full record
Open in tab

The record will open in the Cataloging Editor screen:



If you have already searched for and are displaying the record you want, clicking Edit and then selecting Edit Record will open the title in the Cataloging Editor:

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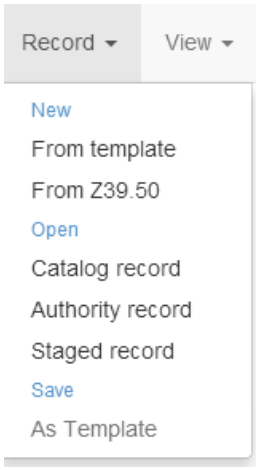
Home › Catalog › Details for Team of rivals :
Normal
MARC
Labeled MARC
ISBD
Items
Holds
Checkout history
Modification log
New
Edit
Save
Add to List
Discovery Lay
Edit Record
Edit Items
Merge Record
Edit as New (Duplicate)
New from Z39.50
Delete Record
Team of
al genius of
Abraham
by Goodwin, D
Type: Book
Publisher: New York : Simon & Schuster, c2005.
Description: xix, 916 p. : ill., maps ; 25 cm.
ISBN: 9780684824901; 0684824906 :; 9781451688092 (pbk.) :.
Other Title: Political genius of Abraham Lincoln.
Related Subjects: Lincoln, Abraham, 1809-1865 | Political leadership United States Case studies | Genius Case studies | Lincoln, Abraham, 1809-1865 Friends and associates | Presidents United States Biography | United States Politics and government 1861-1865

9.2.2 Searching for a Record in the Reservoir

If a staff person has previous created or imported a record, but saved it to the reservoir rather than to the catalog, you can search and retrieve those records. From the Starting Points menu, click Open, Staged Record:



This brings up a search box. You can use the pulldowns to specify either bibliographic, authority, or holdings record, and a record that was staged by you or by anyone:

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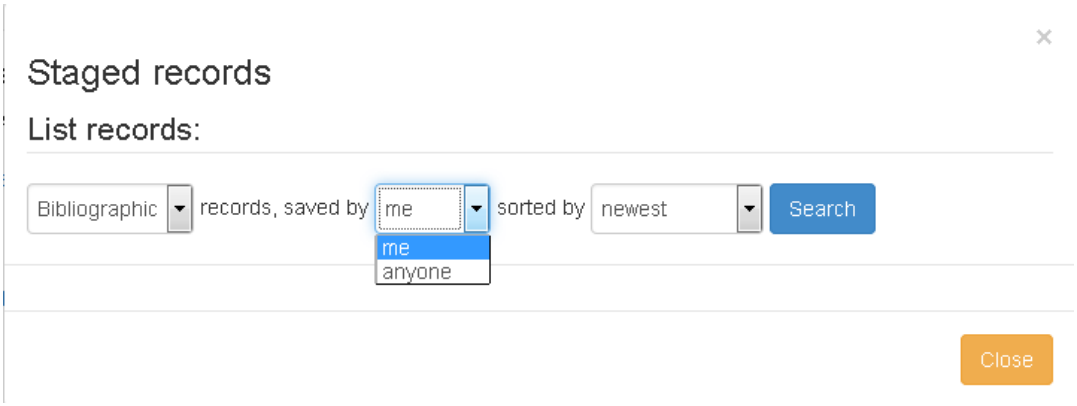

The results list shows titles with a link to the creator's staff patron record, and links to view the record, open it in the editor, or commit the record directly to the catalog:

Catalog record	Description	Cataloger	Date	Action
New bib [52003]	testing reservoir saving View/hide full record	13375	2014-12-05 14:49:46	Commit Open
New bib [52002]	This is a title... View/hide full record	13375	2014-12-05 14:41:55	Commit Open
New bib [52001]	testing View/hide full record	13375	2014-12-05 14:41:36	Commit Open
New bib [52000]	testing reservoir saving View/hide full record	13375	2014-12-05 14:41:16	Commit Open
New bib [51999]	1984 / View/hide full record	13375	2014-12-05 14:35:26	Commit Open
bib 36761	59 seconds : think a little, change a lot / View/hide full record	13375	2014-12-05 14:30:58	Commit Open
New bib [51997]	1988 National Science Foundation authorization : hearings before the Subcommittee on Science, Research, and Technology of the Committee on Science, Space, and Technology, House of Representatives, One Hundredth Congress, first session, February 19, 25; March 11, 24, 1987.	13375	2014-12-05 14:30:32	Commit Open

The planned workflow is that a junior cataloger might create a record and save it to the reservoir. Then a senior cataloger will open the record, check it for accuracy, and commit it to the catalog. When the record is open in the editor, there are options either to save it to the reservoir or to the catalog ("commit changes"):

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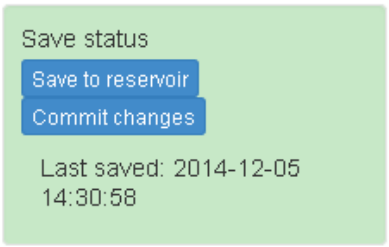
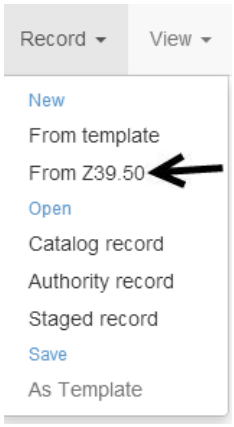
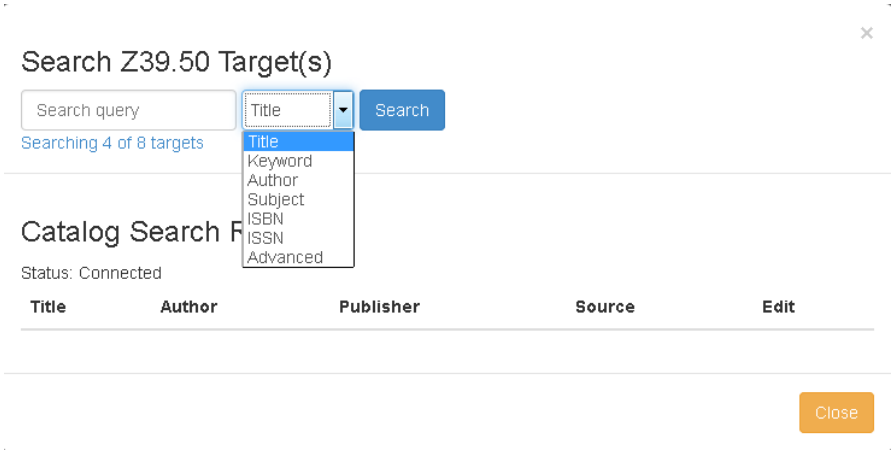


9.2.3 Creating a Bibliographic Record using Z39.50

From the Starting Points menu, click From z3950. A pop-up box will appear which you can use to search z39.50 targets.





You can use the dropdown menu to select your desired search index. Note that placing your search terms in quotes will increase the exactness of the search.

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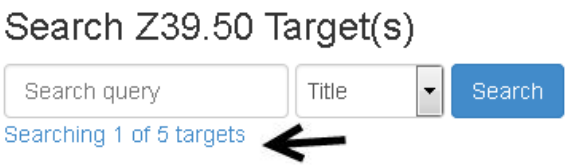
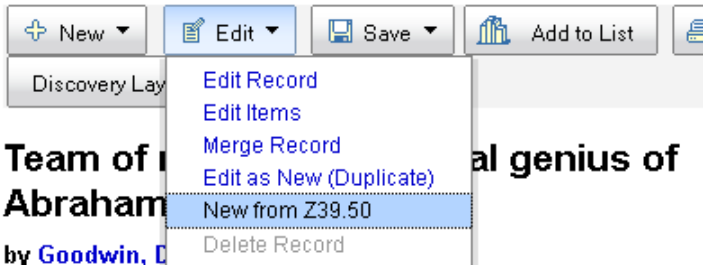
By default, the search will run against all targets specified as "checked" (searched by default) in the z39.50 administrative setup. You can adjust this by clicking the link that reads "Searching x of x targets":



That expands the display to show all available targets. Click or unclick the ones you want to search.

You can also start a z39.50 search from a catalog record display screen, under Edit, New from z39.50:



After entering your search term and selecting your target(s), click the Search button. The search will run against the target(s) and show you a list of results:

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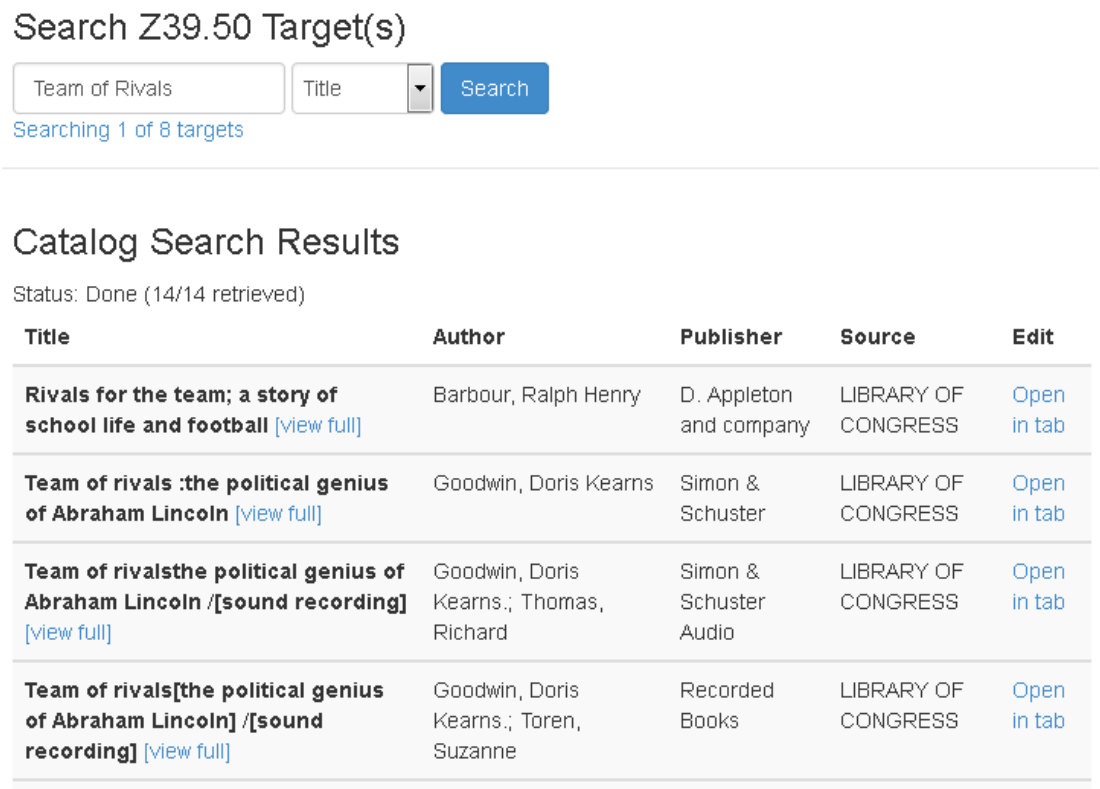

From this screen, clicking the View Full link will expand the display to show a record, so you can decide if it's the one you want:

Searching 1 of 8 targets
Catalog Search Results
Status: Done (14/14 retrieved)
Title
Author
Rivals for the team; a story of school life and football [view full]
Barbour, Ralph He
Team of rivals :the political genius of Abraham Lincoln [view full]
Goodwin, Doris Ke
000 01627cam a2200349 a 4500
001 14096384
005 20060725215945.0
008 050902s2005 nyuab b 001 0beng
906 $a7 $bcbc $corignew $d1 $eocip $f20 $gy-gencatlg
925 0 $aacquire $b2 shelf copies $xpolicy default
955 $apc11 to HLCD 2005-09-02 $clh45 2005-09-07 $dlk29 2005-09-07 to SL $elk53 2005-09-08 to Dewey $aaa05 2005
010 $a 2005044615
020 $a9780684824901 (hardcover)
020 $a0684824906 (hardcover)
040 $aDLC $cDLC $dDLC

Click the Open in Tab link to open the record in the Cataloging Editor:

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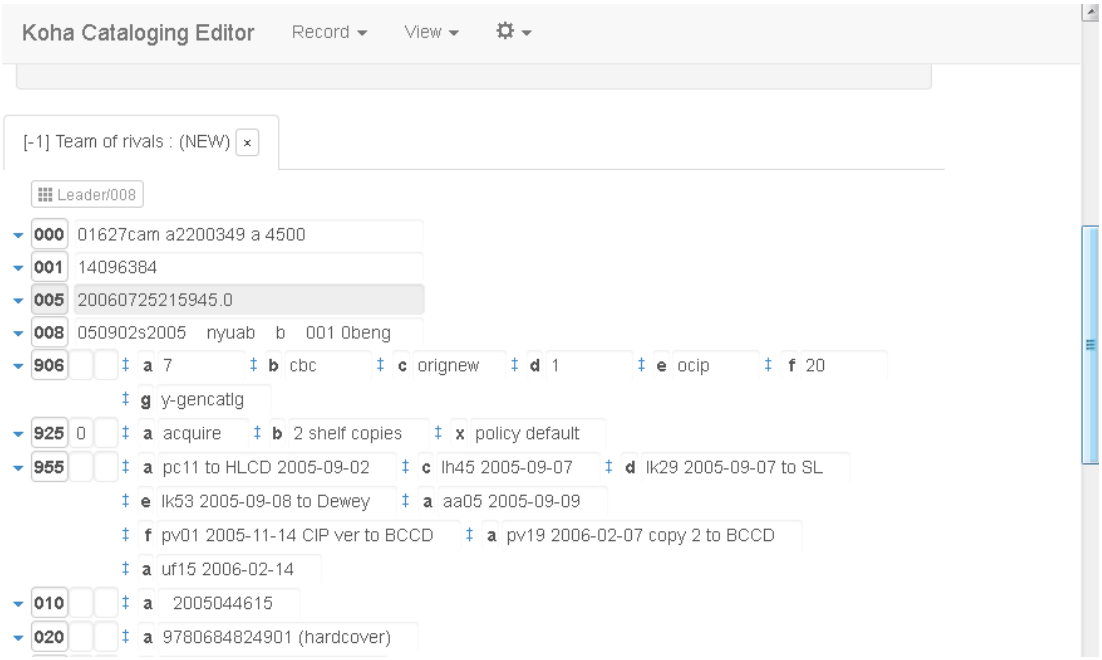
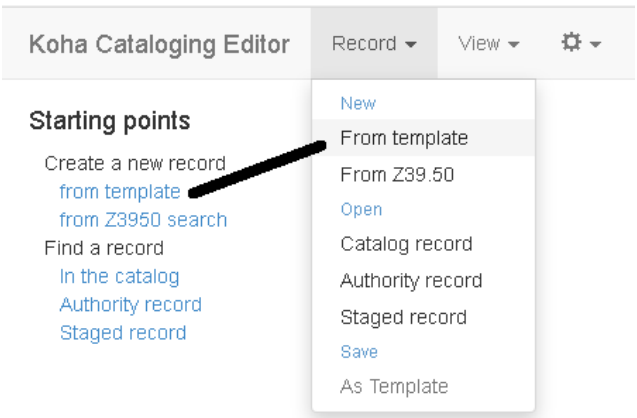

Koha Cataloging Editor
Record
View
[-1] Team of rivals : (NEW)
Leader/008
000 01627cam a2200349 a 4500
001 14096384
005 20060725215945.0
008 050902s2005 nyuab b 001 0beng
906 ‡a 7 ‡b cbc ‡c orignew ‡d 1 ‡e ocip ‡f 20
‡g y-gencatlg
925 0 ‡a acquire ‡b 2 shelf copies ‡x policy default
955 ‡a pc11 to HLCD 2005-09-02 ‡c lh45 2005-09-07 ‡d lk29 2005-09-07 to SL
‡e lk53 2005-09-08 to Dewey ‡a aa05 2005-09-09
‡f pv01 2005-11-14 CIP ver to BCCD ‡a pv19 2006-02-07 copy 2 to BCCD
‡a uf15 2006-02-14
010 ‡a 2005044615
020 ‡a 9780684824901 (hardcover)

Note that the record has not yet been saved into your catalog – you must save it from this screen after you make any changes desired.

9.2.4 Creating a Bibliographic Record From a Template

Templates are defined structures including standard MARC fields for different kinds of records. They can also be used to set default values for large collections. The system is delivered with standard templates for bibliographic, holdings, and authority records; sites can add their own as desired. To open a new record with a template, choose From Template either from the Starting Points menu or under Record, From Template:



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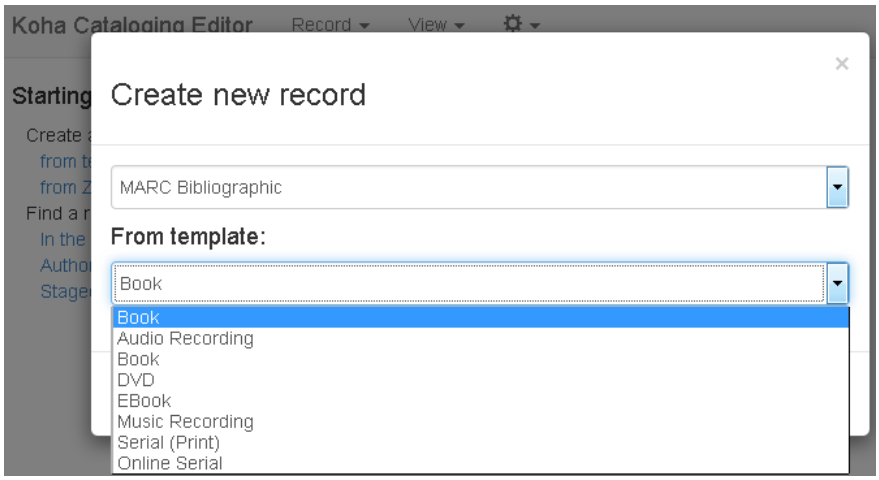
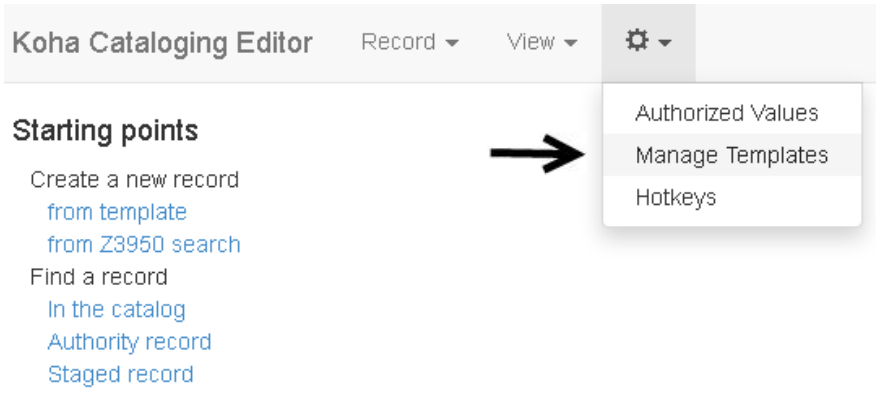
This opens a menu window. Use the top pulldown to select which type of record (bibliographic, holds, authority), then use the bottom pulldown to select the template you want:



Then click the Create New button to open a record in the Cataloging Editor using that template.

You can manage existing templates by clicking the gear icon (Settings) and choosing Manage Templates:



This menu will let you create an empty record from a template, or delete a template:

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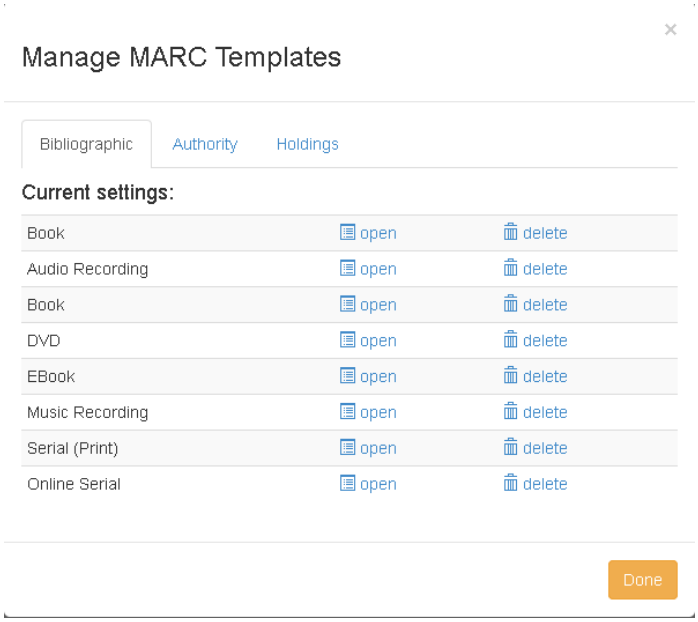
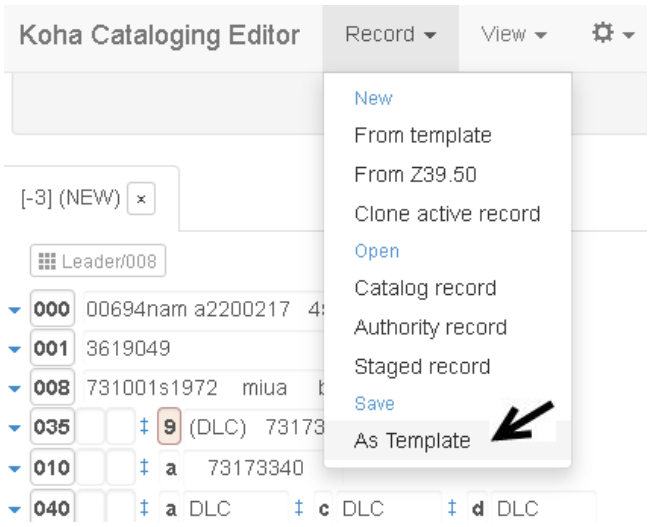


To modify an existing template, or create a new one, open an empty record from an existing template. Add or remove fields and subfields as desired, and make any custom entries (defaults, etc.) you want. Then, under the Record menu, choose Save as Template – give it a name and description.



The default is to overwrite the existing template – you can do that if desired.

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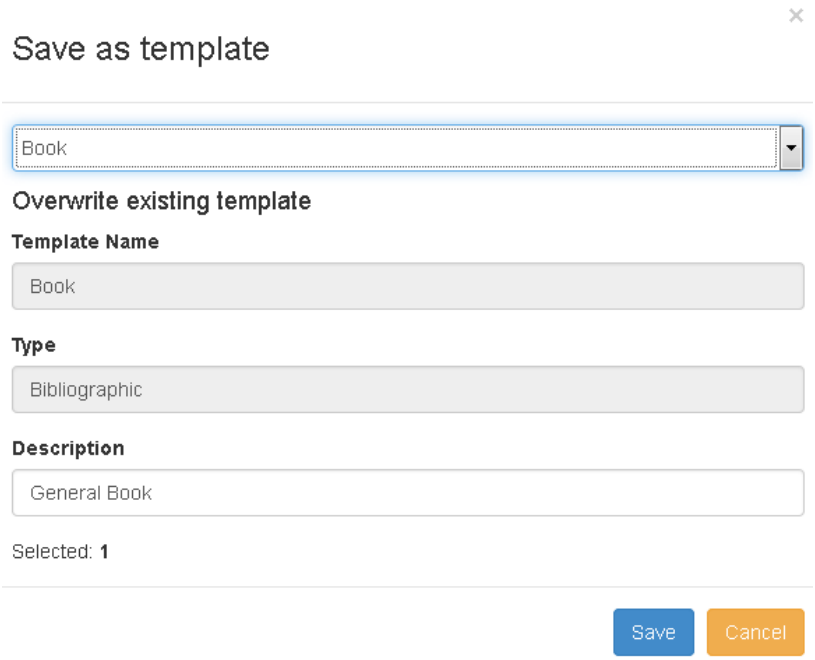
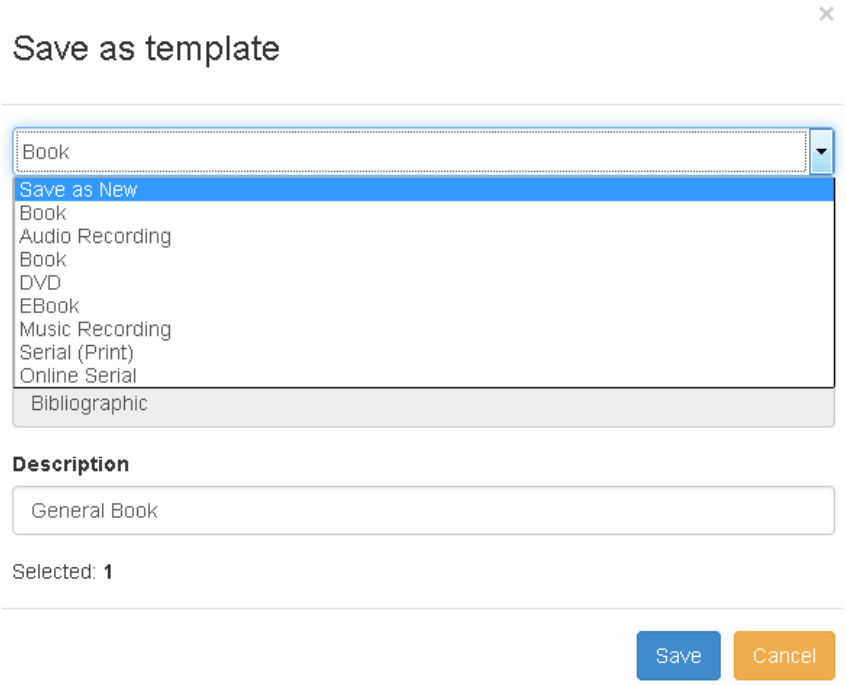


Otherwise, click the top pulldown and choose Save as New. Give it a name and a description.



9.2.5 Importing a Batch of Records

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MARC-format bibliographic records can be batch-imported into the DLS. Note that bibliographic/holdings records must be imported separately from authority records – the two types cannot be merged in the same file.

There are two steps, staging for import and managing staged records. Both functions are found under the Tools menu:

Home › Tools
News
Write news for the OPAC and staff interfaces
Label and Patron Card Creator
Create printable labels and barcodes from catalog data and patron cards from patron data
MARC Import - Stage
Stage MARC biliographic records into the reservoir.
MARC Import - Manage Staged Records
Manage staged MARC records, including completing and reversing imports

9.2.5.1 Stage MARC Records for Import

From Tools, choose MARC Import - Stage. The Stage Marc Records for Import page will display. Click the Browse button and navigate to the location (on your local PC or your network) of the file to be imported.

Once found, click once on the file name and it will appear in the File Name area of the popup.

Stage MARC Biblio Records For Import
Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalog.
You can enter a name for this import. It may be useful, when creating a biblio, to remember where the suggested MARC data comes from!
Stage records into the reservoir
Select the file to stage:
Browse...
No file selected.
Upload file
File Upload
Look in:
temp
Old
4CDs.mrc
auths.mrc
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
File name:
4CDs.mrc
Files of type:
All Files
Open
Cancel

Then click Open and the Stage March Biblio Records for Import page will reappear with the file chosen displayed.

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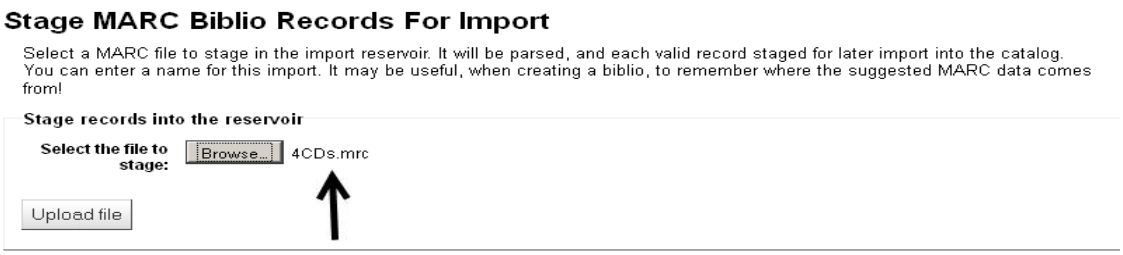
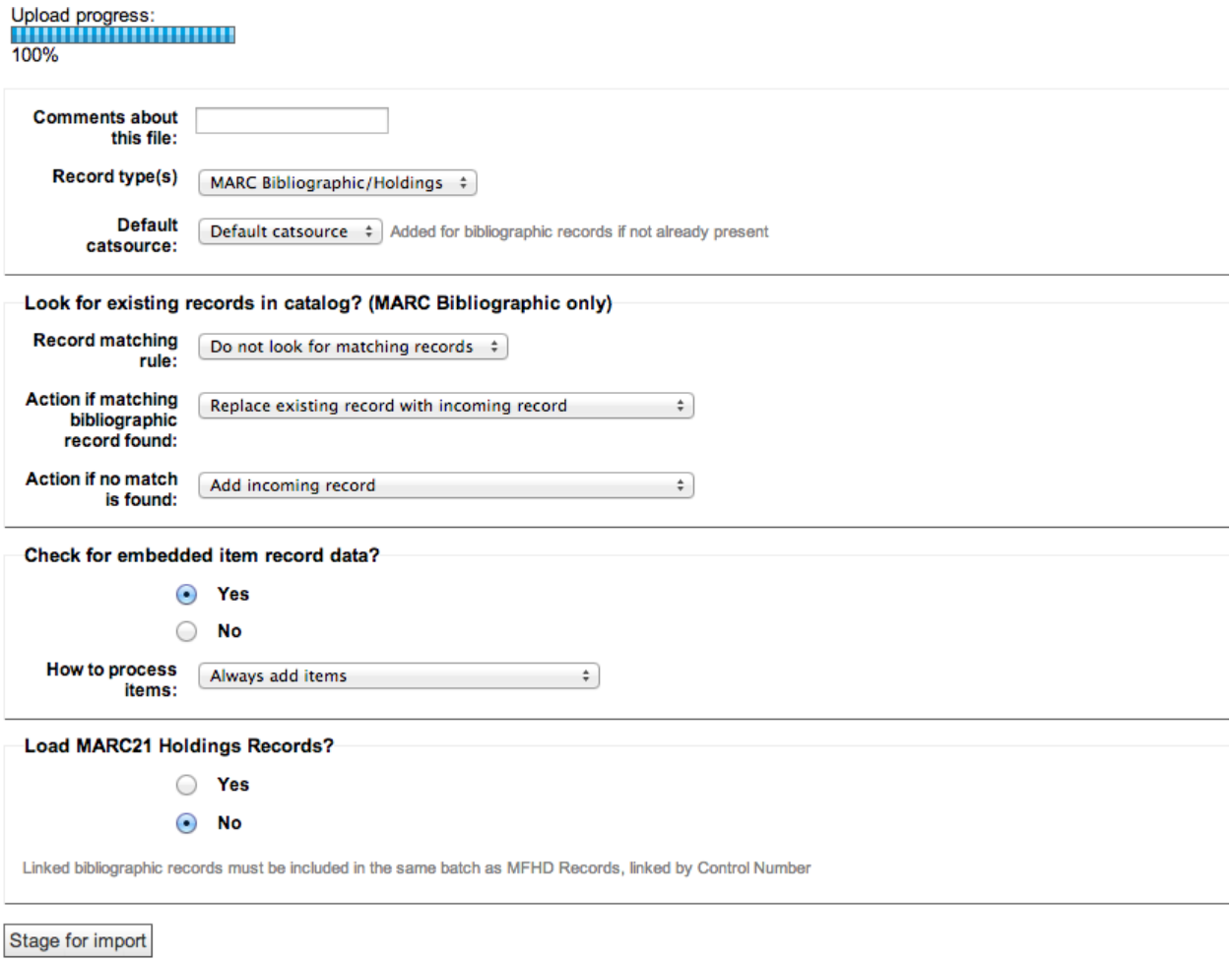

Stage MARC Biblio Records For Import
Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalog.
You can enter a name for this import. It may be useful, when creating a biblio, to remember where the suggested MARC data comes from!
Stage records into the reservoir
Select the file to stage:
Browse...
4CDs.mrc
Upload file

Then click the Upload File button. An upload progress bar will display. When the import is done, both the color of the bar will change and a 100% progress will appear. At that point, you have several options; these apply to bibliographic records only (not authority records):


Upload progress:
100%
Comments about this file:
Record type(s)
MARC Bibliographic/Holdings
Default catsource:
Default catsource
Added for bibliographic records if not already present
Look for existing records in catalog? (MARC Bibliographic only)
Record matching rule:
Do not look for matching records
Action if matching bibliographic record found:
Replace existing record with incoming record
Action if no match is found:
Add incoming record
Check for embedded item record data?
Yes
No
How to process items:
Always add items
Load MARC21 Holdings Records?
Yes
No
Linked bibliographic records must be included in the same batch as MFHD Records, linked by Control Number
Stage for import

You have the option to enter Comments, which can be helpful later for notes about the file's origin or contents.

You **MUST** specify whether the file is bibliographic/holdings or authority records:

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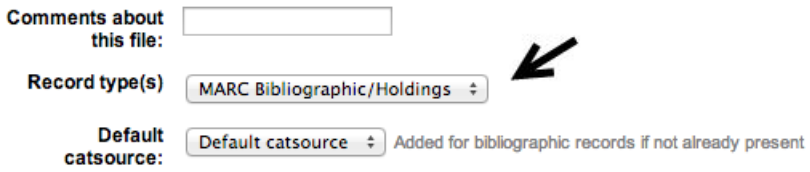
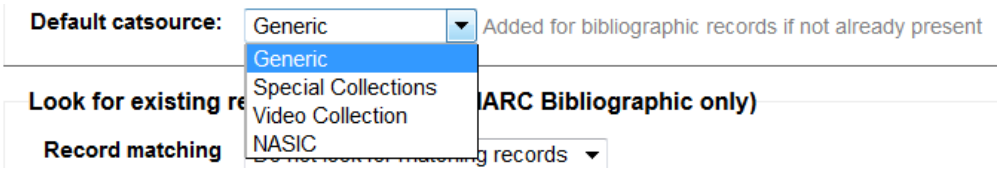


If you select bibliographic, you will then have the remaining options described below. See the section on importing authority records for those options.

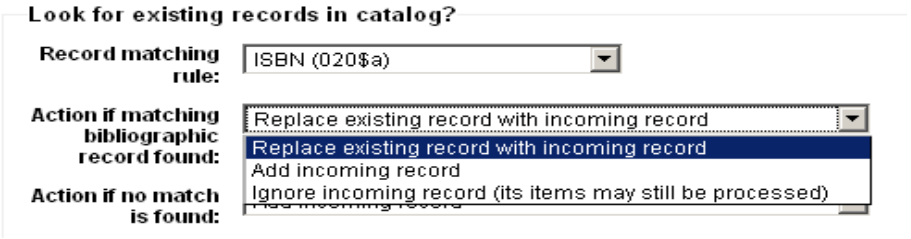
If your site is using cataloging access control, you must specify a catsource from the options available to you in the pulldown. Which options you see depend on what cataloging permissions your login has (see the permissions section).



For character encoding you **MUST** choose MARC21.

You can also choose to check for duplicates when importing by applying a match rule. Depending on what rules are configured on your system (Administration, Record Matching Rules), you could check for matches on fields such as ISBN, 001, 035, or 010. **IMPORTANT**: If you choose to look for a match, the system will only compare the first occurrence of each subfield. Thus, if you choose to match on the 020a then it will only compare the first 020a in both records. If you have multiple 020a subfields, you need to be aware of their order.

You need to specify what should happen if a duplicate is found.


Look for existing records in catalog?
Record matching rule:
ISBN (020$a)
Action if matching bibliographic record found:
Replace existing record with incoming record
Replace existing record with incoming record
Add incoming record
Ignore incoming record (its items may still be processed)
Action if no match is found:

The first (default) option, Replace Existing Record With Incoming Record, will overlay any existing records with new ones from this import. Add Incoming Record will ignore the match and create a new duplicate record. Ignore Incoming Record will leave the existing records intact, adding new item data if that is included in the file.

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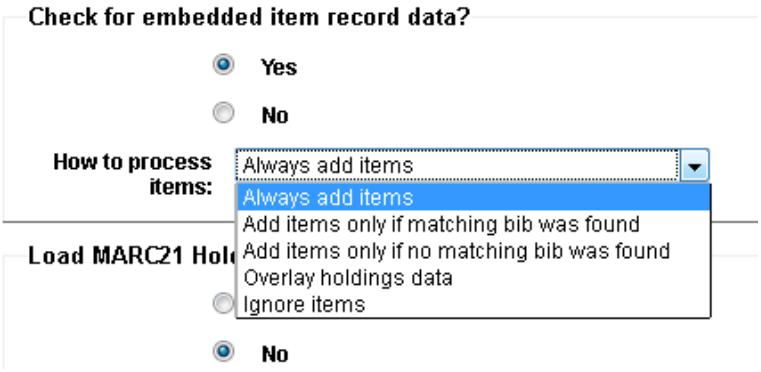
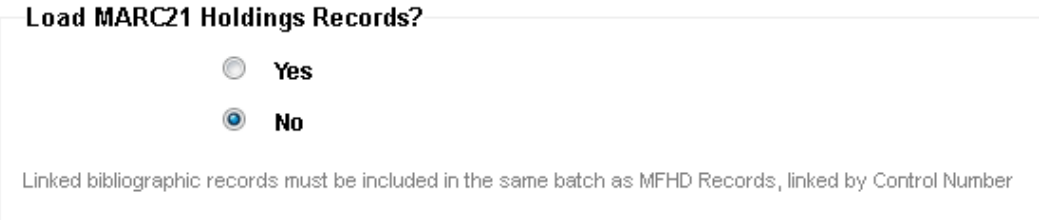
The final setup options allow you to choose whether or not to import item records and/or MARC Holdings records. See the section below on 952 Item Formatting for the syntax to use in item record creation. If your incoming data does not have an item (952) field, click the No radio button and/or select Ignore Items from the pulldown:



If your data does have item records (952 fields), you will usually want the "Always Add Items" entry, but may use one of the others if needed.

If your incoming data includes serial holdings records, you can opt to load those as well:


Load MARC21 Holdings Records?
Yes
No
Linked bibliographic records must be included in the same batch as MFHD Records, linked by Control Number

When you have made your selections, click Click the Stage for Import button. Your MARC file will be parsed, and each valid record staged for later import into the catalog. All staged records go into the reservoir, the holding place for records before they are added to the catalog. Records will remain in the reservoir even after the import is complete.

After the file loads, you'll be taken to a summary screen detailing how many were reviewed and how many records were successfully imported.

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Stage MARC Biblio Records For Import

MARC Staging results :

388 records in file
0 records not staged because of MARC error
388 records staged
0 records with at least one match in catalog per matching rule "ISBN"
0 item records found and staged
Manage staged Biblio records
Back

From this page, users can either return to the staging area to stage more files for import or begin managing the staged records for import (click the Manage Staged Records link in the summary and you'll go directly into the batch).

9.2.5.2 Manage Staged Biblio Records

To manage biblio import files, go to Tools, MARC Import - Manage Staged Records. You'll see a list of all files that have been uploaded, along with their current status. A status of "staged" means the file has been uploaded but not imported into the catalog. A status of "imported" means the file has been imported into the catalog. A status of "reverted" means the file had been imported, but later reversed. The records were then deleted from the catalog but still remain in the reservoir. You can remove the batch from the reservoir entirely by clicking the Clean button (status changes to "cleaned"), but this cannot be undone, so be careful.

Manage Staged MARC Biblio Records

Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

#	File name	Comments	Status	Staged	# Bibs	# Items	Action
769	4CDs.mrc		staged	2013-12-19 13:28:24	388	0	Clean
768	record.mrc		imported	2013-12-18 11:11:25	1	0	Clean
767	OL7178810M.rdf		cleaned	2013-12-18 11:10:02	0	0	
766	785735FB.mrc		staged	2013-12-12 16:40:07	10	10 (Create Label Batch)	Clean
765	demo-testitems2.mrc		staged	2013-12-12 15:51:10	7	13 (Create Label Batch)	Clean
764	RDA_Test Records_from _LC.mrc		reverted	2013-10-23 14:41:24	30	0	Clean
763	all.xlsx		staged	2013-10-10 03:25:36	0	0	Clean
762	cmarc_test_06_90.out	feu test	staged	2013-09-29 01:52:51	90	0	Clean
761	hyweb-cmarc_test_06_90.iso	feu-test	staged	2013-09-29 01:49:43	90	0	Clean
760	ugc1.7.mrk	UGC Titles	staged	2013-08-24 02:28:01	0	0	Clean

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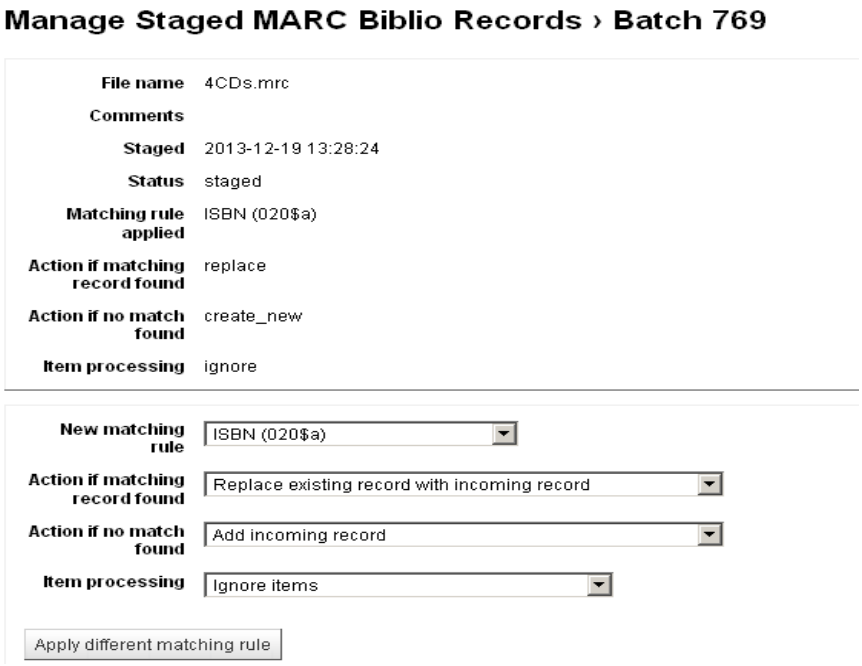
Click on the filename you want to manage, and it will show you details about the records. In the top part of the screen, you will see the current settings and can opt to apply a different matching rule:


Manage Staged MARC Biblio Records › Batch 769
File name 4CDs.mrc
Comments
Staged 2013-12-19 13:28:24
Status staged
Matching rule applied ISBN (020$a)
Action if matching record found replace
Action if no match found create_new
Item processing ignore
New matching rule ISBN (020$a)
Action if matching record found Replace existing record with incoming record
Action if no match found Add incoming record
Item processing Ignore items
Apply different matching rule

Scroll down, and the bottom part of the screen has links for each record in the batch:

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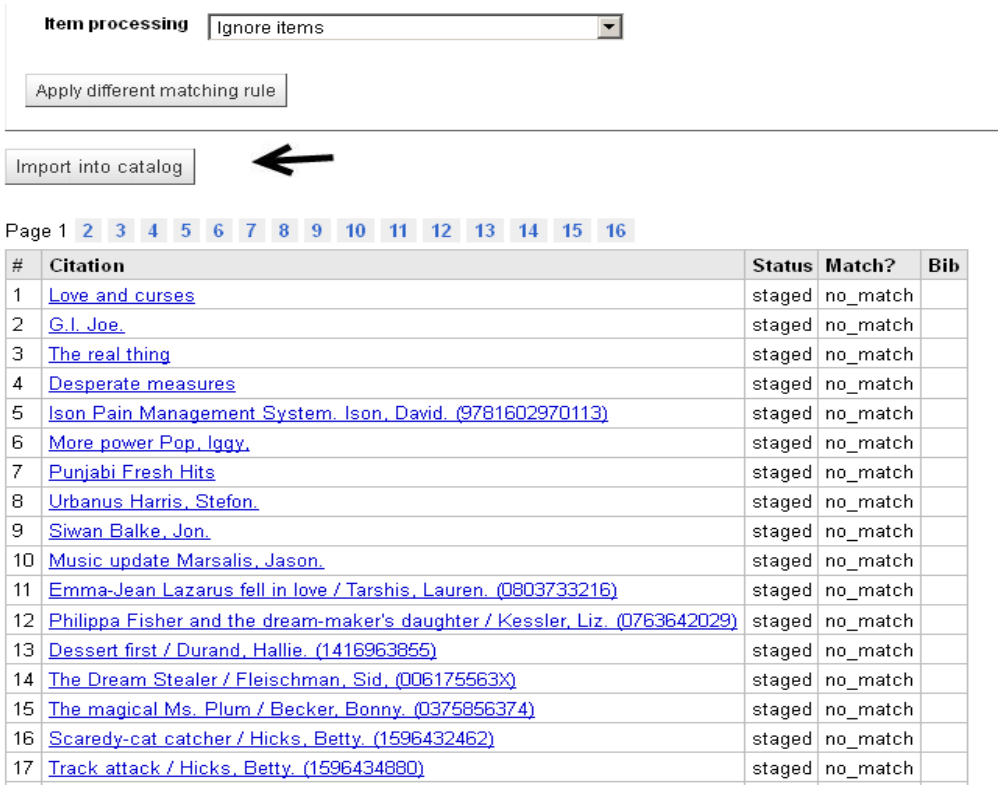
Item processing
Ignore items
Apply different matching rule
Import into catalog
Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16
Citation Status Match? Bib
1 Love and curses staged no_match
2 G.I. Joe. staged no_match
3 The real thing staged no_match
4 Desperate measures staged no_match
5 Ison Pain Management System. Ison, David. (9781602970113) staged no_match
6 More power Pop, Iggy. staged no_match
7 Punjabi Fresh Hits staged no_match
8 Urbanus Harris, Stefon. staged no_match
9 Siwan Balke, Jon. staged no_match
10 Music update Marsalis, Jason. staged no_match
11 Emma-Jean Lazarus fell in love / Tarshis, Lauren. (0803733216) staged no_match
12 Philippa Fisher and the dream-maker's daughter / Kessler, Liz. (0763642029) staged no_match
13 Dessert first / Durand, Hallie. (1416963855) staged no_match
14 The Dream Stealer / Fleischman, Sid. (006175563X) staged no_match
15 The magical Ms. Plum / Becker, Bonny. (0375856374) staged no_match
16 Scaredy-cat catcher / Hicks, Betty. (1596432462) staged no_match
17 Track attack / Hicks, Betty. (1596434880) staged no_match

If you click on a title, it will show a popup window of the MARC record:

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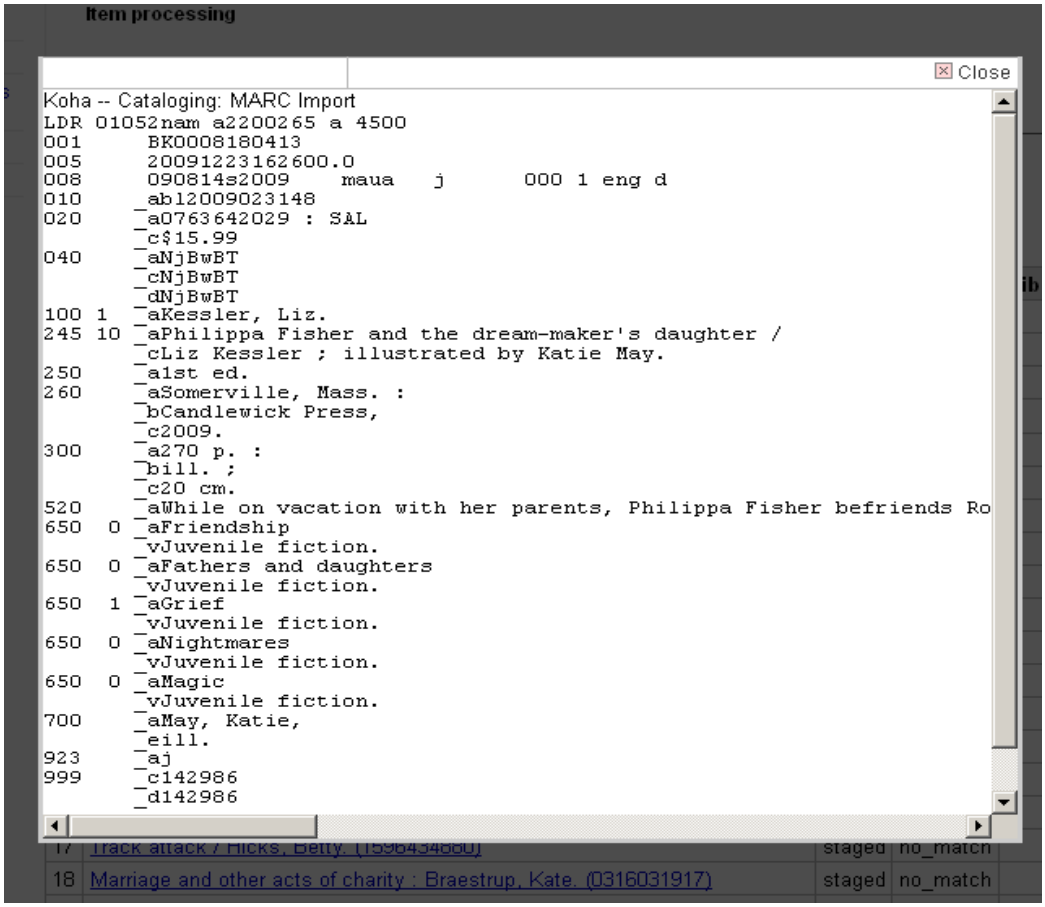

If the incoming record matched a title already in the catalog, you'll see a link to that record in the last column. When you are ready to import, click the Import Into Catalog button found between those two sections of the screen.

While the file is importing, you'll see a progress bar on the screen. When the import is complete, the screen will summarize the work done and confirm completion of the import. It may take a few minutes for the records to be fully indexed and searchable.

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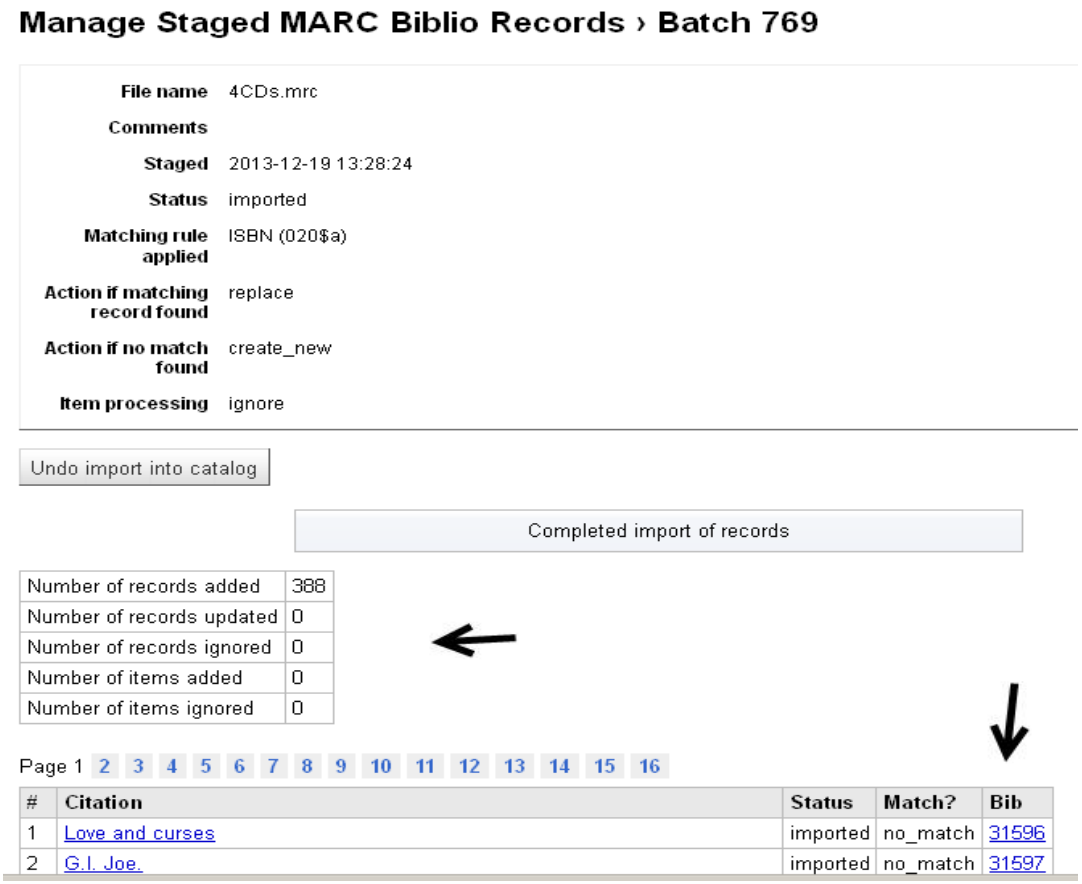
Manage Staged MARC Biblio Records › Batch 769
File name 4CDs.mrc
Comments
Staged 2013-12-19 13:28:24
Status imported
Matching rule applied ISBN (020$a)
Action if matching record found replace
Action if no match found create_new
Item processing ignore
Undo import into catalog
Completed import of records
Number of records added 388
Number of records updated 0
Number of records ignored 0
Number of items added 0
Number of items ignored 0
Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16
Citation Status Match? Bib
1 Love and curses imported no_match 31596
2 G.I. Joe. imported no_match 31597

The summary screen shows record counts and also lists each title. As with the Manage Staged Records screen, clicking on the title will open a popup with the MARC record. On this screen, however, the last column has a link to the newly-loaded title record. Clicking that link will take you to the title.

WARNING: Large files can take a long time to both upload and import, and may outlast the browser's timeout. In general, do not try to import files larger than about 1,000 records; break them up into smaller files.

9.2.5.3 952 Item Formatting

If you create batches of records on OCLC, or get records from a vendor, you can format them to include item information. Create a 952 entry with item details, and when you import the title record the DLS will create an item record. Note that you have to use the actual codes, not the descriptions for the library, location, item type, etc. The DLS is case-sensitive, so make sure your codes are entered exactly as they were created on your system (usually in upper case).

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Item information is imported in the MARC 952 field, but some title/item information also is placed in the 942 field. In particular, 942 subfield c contains another setting for item type – this does not directly apply to items, but is used for display in a few places. Adding this setting can help to avoid confusion later.

So for each title, you need:

One 942 $c with the itemtype code (use the item type of the first or most common item if more than one are attached).

952 (add as many as you have items for that title) – here are the most common fields you'll want to set:

- $8 collection code
- $a owning library code
- $b current library code
- $c shelving location code
- $k cataloging status
- $o full call number, including cutter
- $p barcode
- $v replacement price (if available) -- this is what's used to determine billing cost to patrons for lost items. (No dollar sign in front of the price)
- $y itemtype code

The above are the most common fields (unless your library doesn't use a field such as shelving location or collection code). **The $a, $b, and $y are absolutely necessary – do not create items without branchcode settings and preferably also an item type**. There are some other 952 subfields that you might want to use, depending on your data, but these are not critical for a data load:

- $7 set to 1 if the item is not for loan (set to negative value -1 to allow holds on On-Order materials)
- $d date acquired

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- $e source of acquisition (name or abbreviation of publisher or vendor)
- $g original purchase price
- $h volume/issue information for serial items
- $x internal note (visible in staff mode, for specific notes about the item)
- $z public note (visible to patrons in the OPAC, for specific notes about the item)

See the item record create/edit screen for other subfields if needed.

A sample 942/952 entry might look like this (format is the MarcEdit flat display):

=942 \\$cBK
=952 \\$w2009-07-12$p39344008005024$v7.00$40$00$oSCI FIC ANTHONY$bMAIN$10 $d2007-03-20$8SCIFI$h(PB)$70$cSTACKS$g7.00yBKaMAIN

The entry should be all one line (the above is broken for display). Do **NOT** put a space between the subfield code and the entry – use $yBK, not $y BK.

9.2.5.4 Reverting Batches

An imported batch of bibliographic records can be reverted, which deletes the records from the main catalog but leaves them in the reservoir. Some sites use this for temporary records, such as subscription-based eresources, which are then removed when the subscription expires and is not renewed. This is not recommended as a standard practice, though.

However, there are times you may want to revert a batch – if you see problems with the item record formatting after load, or realize that you've loaded the wrong records. **Be aware that if you have manually deleted ANY of the title records, the revert will not work. None of the records after that point in the batch will be removed.**

To revert a batch, go to Tools, Biblio Import - Manage Staged Records. Locate the batch you want to unload and click on its name. That takes you into the details screen for that batch.

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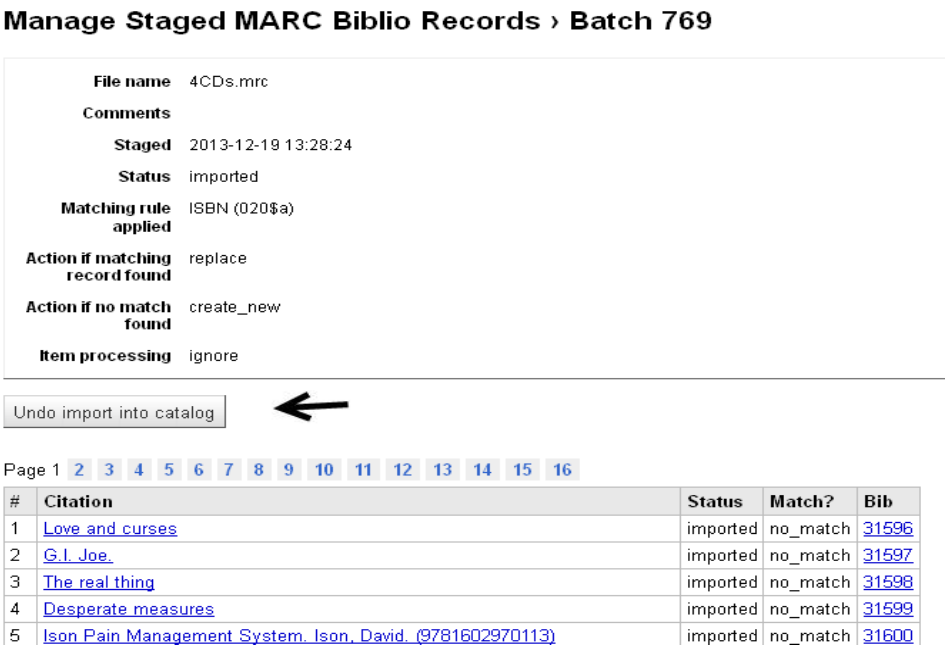
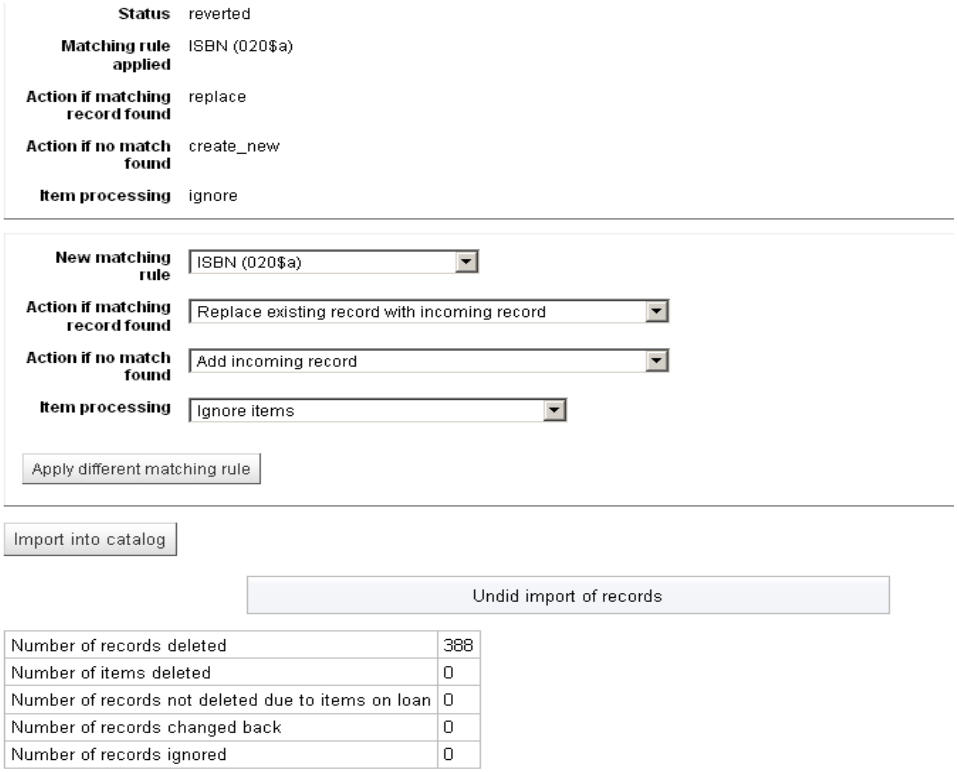

Manage Staged MARC Biblio Records › Batch 769
File name 4CDs.mrc
Comments
Staged 2013-12-19 13:28:24
Status imported
Matching rule applied ISBN (020$a)
Action if matching record found replace
Action if no match found create_new
Item processing ignore
Undo import into catalog
Page 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16
Citation Status Match? Bib
1 Love and curses imported no_match 31596
2 G.I. Joe. imported no_match 31597
3 The real thing imported no_match 31598
4 Desperate measures imported no_match 31599
5 Ison Pain Management System. Ison, David. (9781602970113) imported no_match 31600

Click on the 'Undo import into catalog' button to revert the batch. You'll see a progress meter while the system is working. When it has finished, the screen will change to show details about the batch. The status has changed to reverted. The screen will also summarize the delete actions.


Status reverted
Matching rule applied ISBN (020$a)
Action if matching record found replace
Action if no match found create_new
Item processing ignore
New matching rule ISBN (020$a)
Action if matching record found Replace existing record with incoming record
Action if no match found Add incoming record
Item processing Ignore items
Apply different matching rule
Import into catalog
Undid import of records
Number of records deleted 388
Number of items deleted 0
Number of records not deleted due to items on loan 0
Number of records changed back 0
Number of records ignored 0

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You could apply a different matching rule and redo the import, if desired.

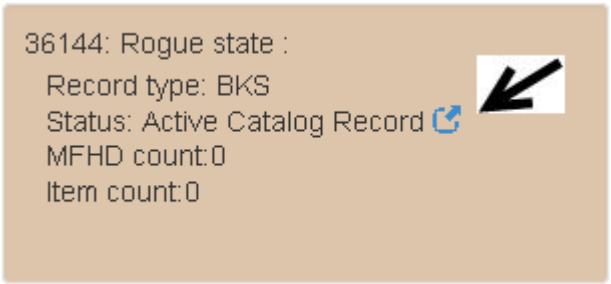
9.3 Editing New or Existing Bibliographic Records

Whichever method you use to open a bibliographic record in the editor, you will use the same tools and techniques to edit it. You need to become familiar with the editor screen and how to enter data.

9.3.1 Screen Layout

At the top of the bib record itself, extensive information about this record shows in a summary box (brown background for bibliographic records). This includes the biblionumber and title, the record type and status, whether holdings and/or item records are attached, and whether changes need to be saved.

At any point you can return to the title display without saving changes by clicking the blue circle/arrow icon:



The bottom half of the bibliographic display shows the full bibliographic record, on a single page.

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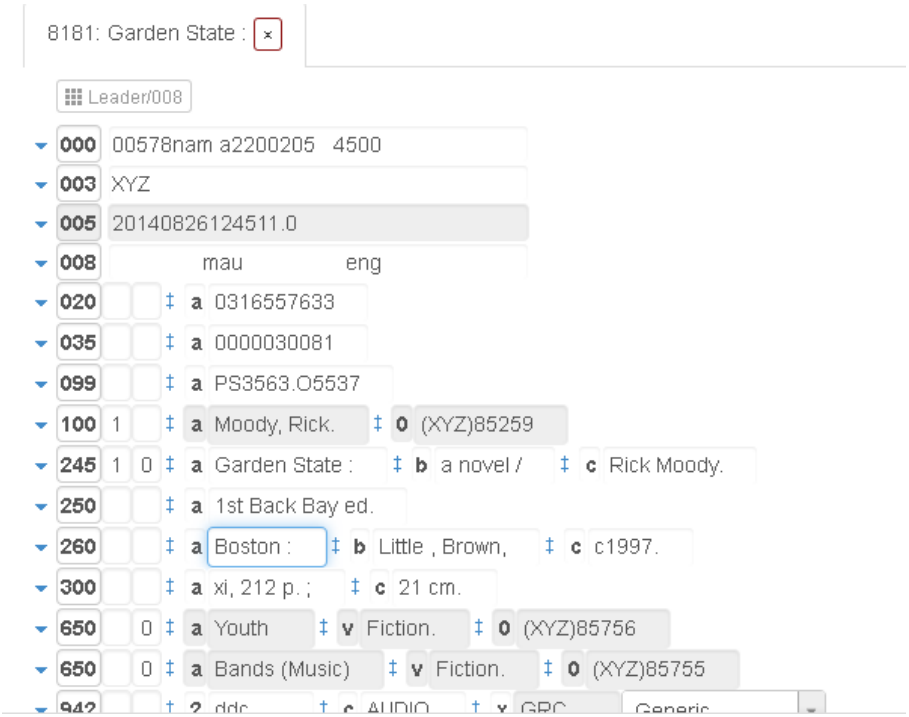
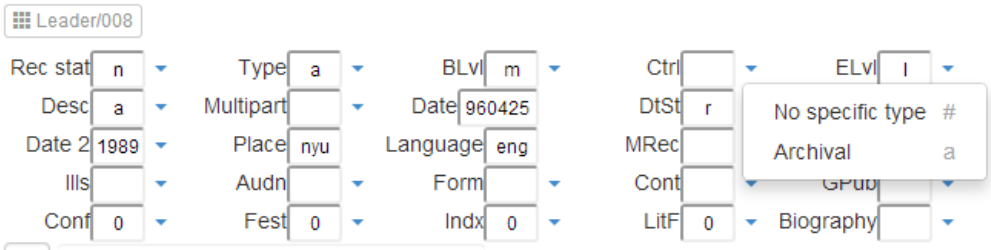

8181: Garden State :
Leader/008
000 00578nam a2200205 4500
003 XYZ
005 20140826124511.0
008 mau eng
020 ‡ a 0316557633
035 ‡ a 0000030081
099 ‡ a PS3563.O5537
100 1 ‡ a Moody, Rick. ‡ 0 (XYZ)85259
245 1 0 ‡ a Garden State : ‡ b a novel / ‡ c Rick Moody.
250 ‡ a 1st Back Bay ed.
260 ‡ a Boston : ‡ b Little , Brown, ‡ c c1997.
300 ‡ a xi, 212 p. ; ‡ c 21 cm.
650 0 ‡ a Youth ‡ v Fiction. ‡ 0 (XYZ)85756
650 0 ‡ a Bands (Music) ‡ v Fiction. ‡ 0 (XYZ)85755

All fields not under authority control can be edited by moving the cursor to the field/subfield and typing new text. Fields under authority control cannot be edited from the bibliographic record; the authority record must be edited for changes to be made to these fields. See the section Link Bibliographic Record to an Authority Record for further details.

The Leader and 008 is editable in a pop-up box – click the

to expand those options:



Each blue arrow provides a pick list of terms. Comparable editable areas are offered for other fixed fields:

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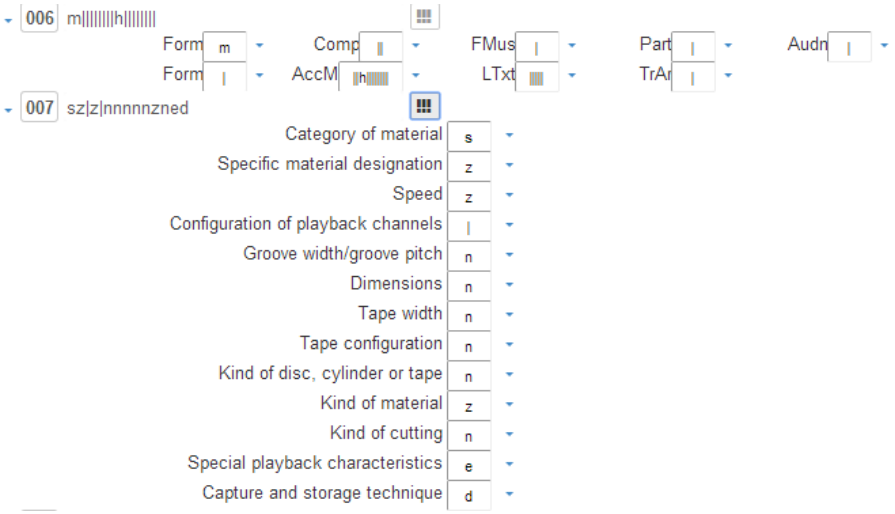
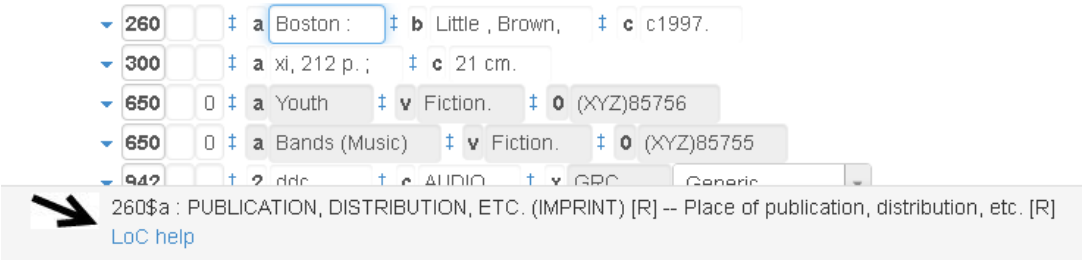


9.3.2 Library of Congress Help

A static footer at the bottom shows the name of the MARC field and a link to the Library of Congress MARC standard page for whichever field has the cursor.


260 ‡ a Boston : ‡ b Little , Brown, ‡ c c1997.
300 ‡ a xi, 212 p. ; ‡ c 21 cm.
650 0 ‡ a Youth ‡ v Fiction. ‡ 0 (XYZ)85756
650 0 ‡ a Bands (Music) ‡ v Fiction. ‡ 0 (XYZ)85755
260$a : PUBLICATION, DISTRIBUTION, ETC. (IMPRINT) [R] -- Place of publication, distribution, etc. [R]
LoC help

The Library of Congress or rules are reviewed each time a bib record is edited. Any field or subfield that is in conflict with these rules has a visual clue – a red shading in the field and/or subfield label. For instance, this bib record below, the fields and subfields that are in conflict with the LOC rules are shaded in red.

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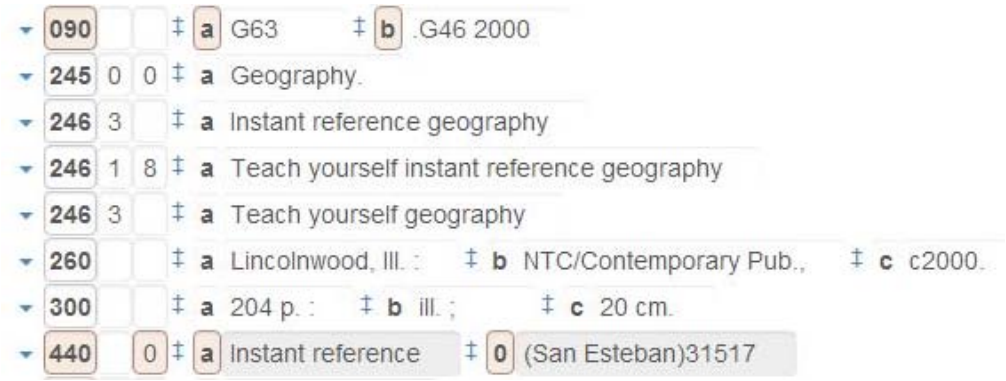
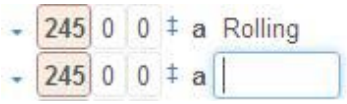
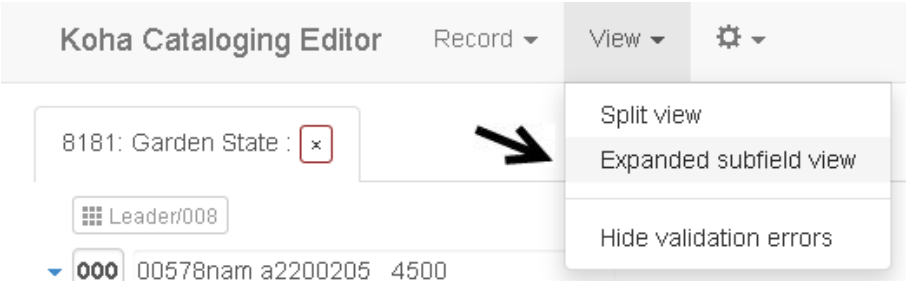

090 ‡a G63 ‡b .G46 2000
245 0 0 ‡a Geography.
246 3 ‡a Instant reference geography
246 1 8 ‡a Teach yourself instant reference geography
246 3 ‡a Teach yourself geography
260 ‡a Lincolnwood, Ill. : ‡b NTC/Contemporary Pub., ‡c c2000.
300 ‡a 204 p. : ‡b ill. ; ‡c 20 cm.
440 0 ‡a Instant reference ‡0 (San Esteban)31517

A bib record with two 245 fields will display both fields in red, indicating to the cataloger that there is a problem:



9.3.3 Expanded MARC View

Another option for viewing the record is to see the subfields on separate lines rather than on the same line (as shown in other screenshots). To see this view, when the record is displayed, choose View, Expanded subfield View.



The record will now display like this:

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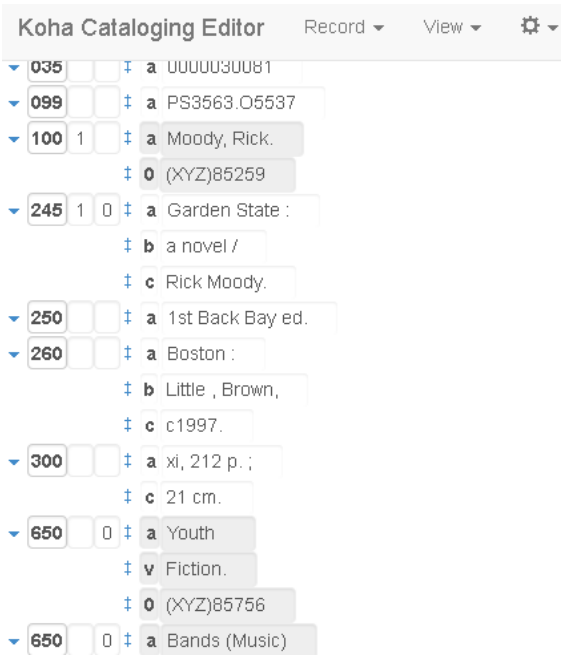
Koha Cataloging Editor
Record
View
035 ‡ a UUUUU3UU81
099 ‡ a PS3563.O5537
100 1 ‡ a Moody, Rick.
‡ 0 (XYZ)85259
245 1 0 ‡ a Garden State :
‡ b a novel /
‡ c Rick Moody.
250 ‡ a 1st Back Bay ed.
260 ‡ a Boston :
‡ b Little , Brown,
‡ c c1997.
300 ‡ a xi, 212 p. ;
‡ c 21 cm.
650 0 ‡ a Youth
‡ v Fiction.
‡ 0 (XYZ)85756
650 0 ‡ a Bands (Music)

9.3.4 Editing Bibliographic Fields not under Authority Control

All data within fields NOT under authority control can be editing by moving cursor to the desired field and changing text. For example, to change the 300$a, move cursor to that field. Highlight existing text if you want to delete it, and/or type in desired changes.

Edits to fields under authority control require the Authority record to be edited (see later section). The Cataloging Editor provides a visual clue when a field is under authority control and not editable; the field itself is grayed out, and on the screen a red circle with a line through it appears.

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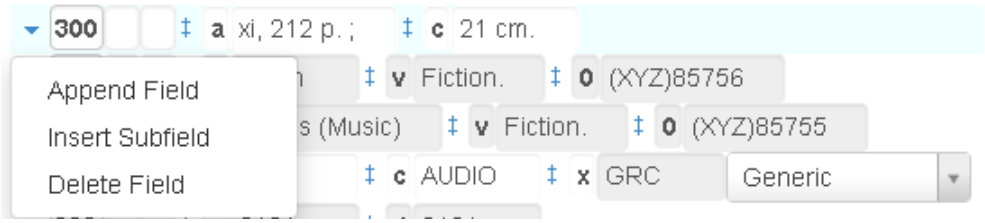
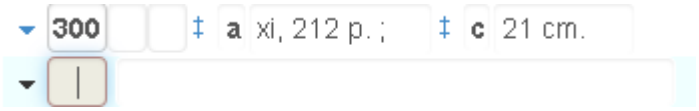
9.3.4.1 Adding Bibliographic Fields and/or Subfields

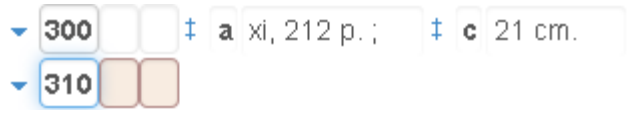
To add a new field to the existing record, navigate to the field directly before/above where the new field will display. Then click the down-arrow next to that field's label:


300 ‡ a xi, 212 p. ; ‡ c 21 cm.
‡ v Fiction. ‡ 0 (XYZ)85756
s (Music) ‡ v Fiction. ‡ 0 (XYZ)85755
‡ c AUDIO ‡ x GRC Generic
Append Field
Insert Subfield
Delete Field

You can add a new field under the current field, insert a subfield into the line where the cursor presently is, or delete the present field. If your cursor is on a field under authority control, some additional options will show; see the section on authority control for the use of those options. Click Append Field to add a new MARC field:

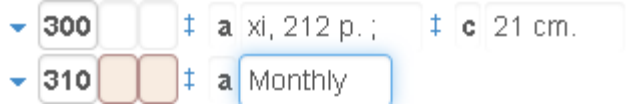


Type the field number into the first data well. Enter any desired indicators into the second and third.



Then use the pulldown arrow next to the field you just added, and select Insert Subfield. This will give you a data well for the subfield ID:

Enter the subfield code (for example, a for $a) and you will get a data well for the actual field content:



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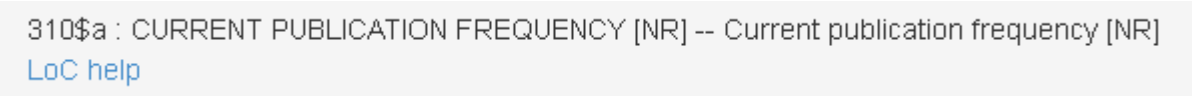
Note that as data within the field is being entered, the dynamic link to LOC help is populated and is available for consultation as the field is completed.



9.3.4.2 Copy and Paste an Entire Field

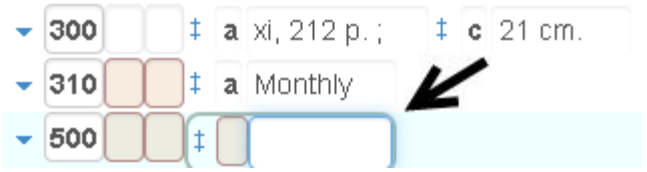
You can copy an entire field (with indicators and subfields) between records. Click on the tag number (650 in this example) of the field you want to copy and press Ctrl-C to copy. The entire line will show as selected. In the other record, insert a new field. Click on the blank tag and press Ctrl-V to paste. The field tag, indicators, subfields, and contents will paste and the entire line will show as selected:

9.3.4.3 Paste Content into One Subfield and Create Additional Subfields

Pasting a string such as this:

‡b 16896 ‡d W0011730.000 ‡e W0011229.000

directly into a subfield box will create the additional subfields ($b, $d, and $e with content):



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In this case, I gave the Add Subfield command but did not enter a subfield letter. I placed the cursor into the first content data well and pasted the string. Note that a space is required before and after the ‡ symbol.

9.3.5 Editing Bibliographic Fields under Authority Control

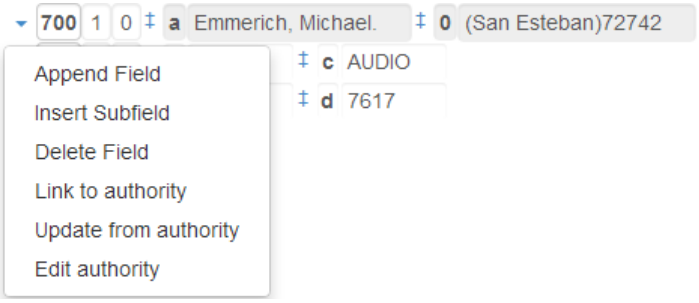
Fields under authority control cannot be edited from the bibliographic record; changes to those fields must be made in the controlling authority record. The Cataloging Editor provides a visual clue when a field is under authority control and not editable; a red circle with a line through it appears when the cursor is placed on a field or subfield under authority control.

If the authority record was imported from a source like Library of Congress or OCLC, the authority record shows as grayed-out (as above). If the authority is a machine-generated record, the display is red:

This is a visual cue that the cataloger may want to upload or link to a more complete record.

9.3.6 Editing an Authority Record from a Bibliographic Record

To edit an authority record, click the arrow at the left of the authority field MARC number.



Choose Edit Authority and the authority record will open in a tab next to the bib record:

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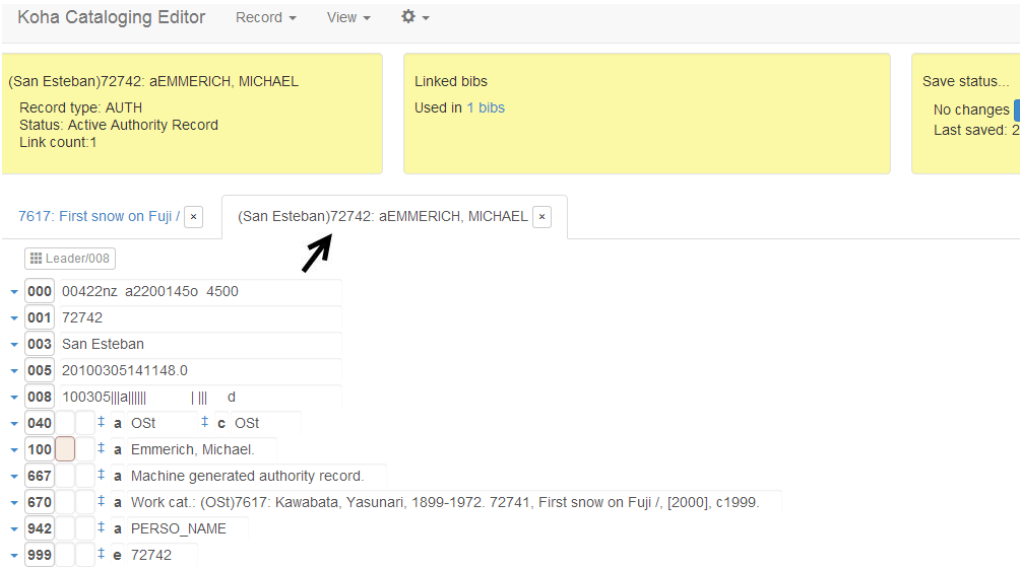
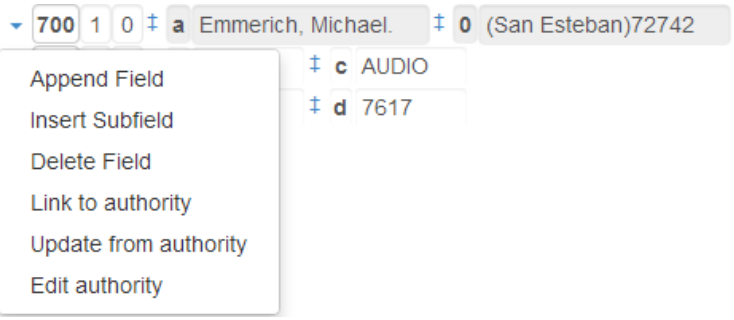


When the cursor is in the authority record tab, the header areas above the record are yellow. If you click back to the bib record, those areas will return to brown.

Make any needed changes and Save from the top right hand side of the record. You can close the record by clicking on the X in the tab header, or leave it open if you want. Then return to the bib record. It should have updated itself automatically with the change to the authority record. If it didn't, you can click the arrow next to the MARC field again, and this time choose Update from Authority.



The entry in the bib record will update itself based on the changes you made to the authority record. Other bib records linked to that authority record will automatically update.

9.3.7 Viewing Two Bibliographic Records, Side by Side

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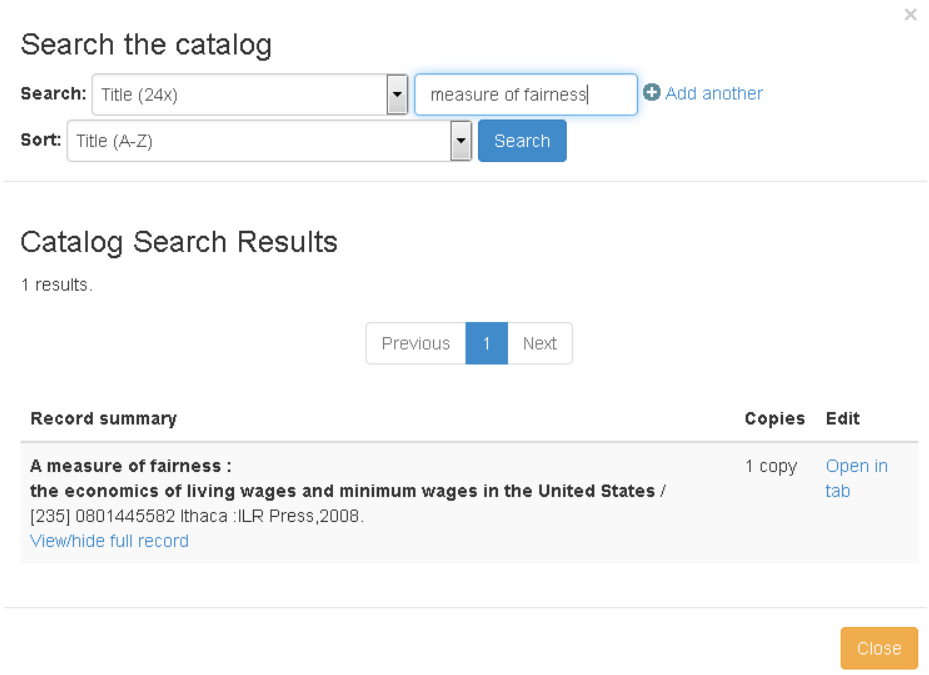
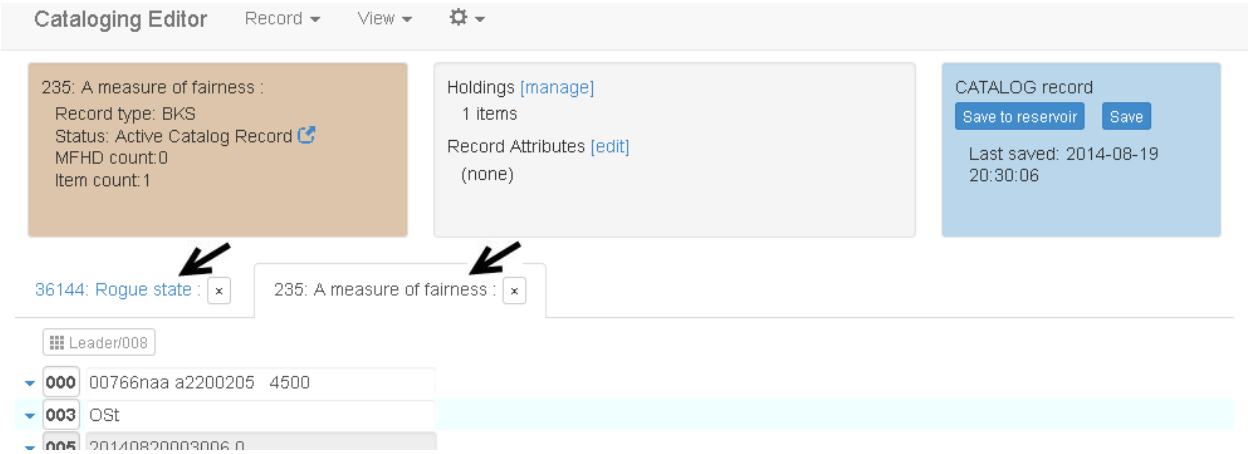
You can compare bib records by displaying both in the editor. With a single record open, conduct a search and find a second record (either via z39.50 or by searching the catalog)



From search results provided by search, choose “Open in tab”

The selected record will appear as a tab in the Cataloging Editor as shown below; the newest selected record will be on the far right side of options.



Now, to view both bibliographic records side by side, go to the View menu at the top of the Cataloging Editor and choose Split View:

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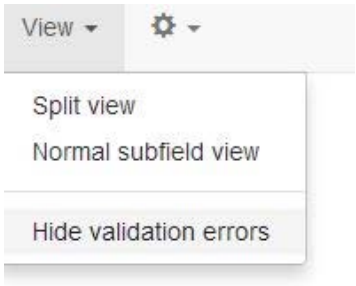
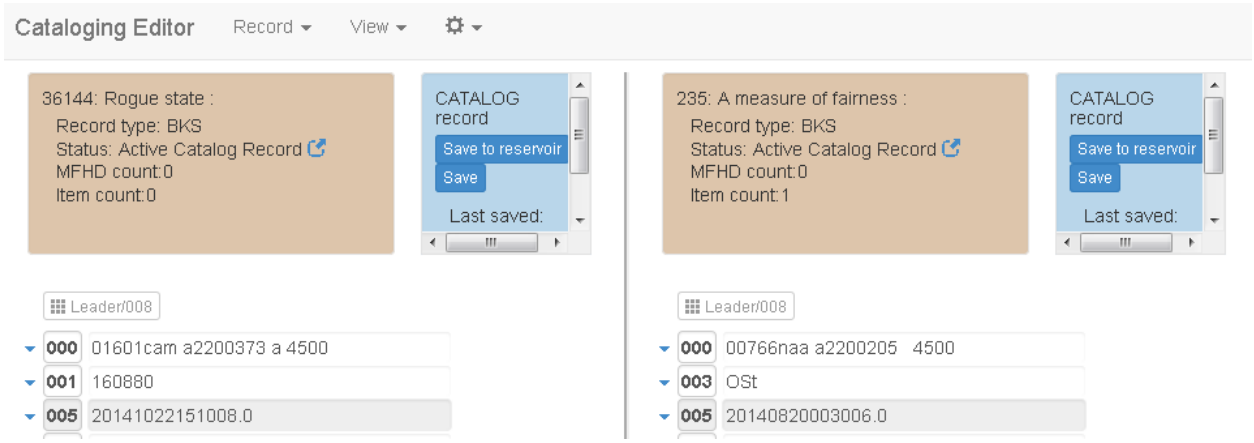


The bibliographic records in the tabs will display side by side:



9.3.8 Adding or Editing a Bibliographic Record Attribute

Record attributes allow staff to flag bibliographic records for various reasons, so those records can be identified and receive special handling. This functionality is intended to address:

- Retrieving personal copies that have been placed on reserve, using the Personal Copy attribute in conjunction with creating brief records.
- Retrieving and exporting records that have been marked for export to OCLC or another utility, using the "Ready to Export" attribute.
- Retrieving records that require maintenance as of a certain date, using any of the attributes and the effective dates.
- Records that need circulation or cataloging staff attention upon return.
- Brief catalog records and ILL records.

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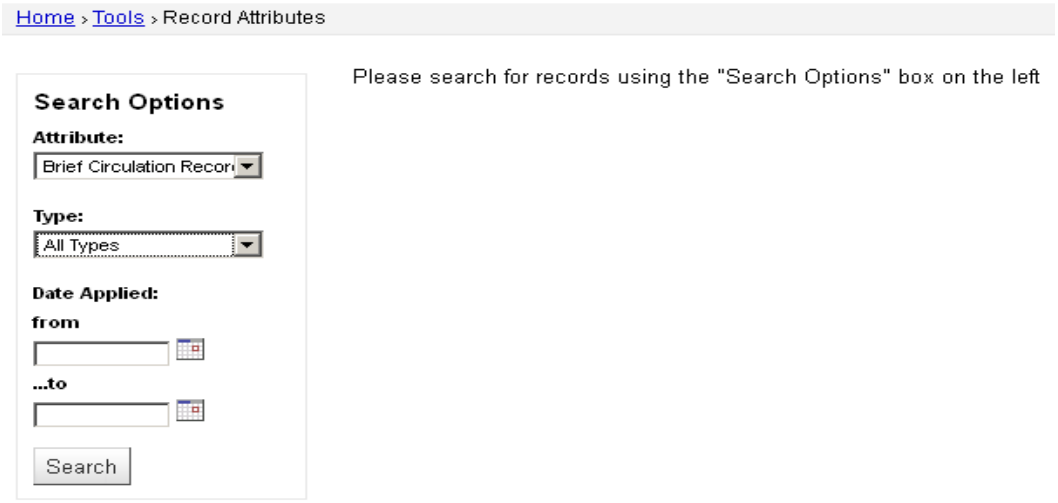
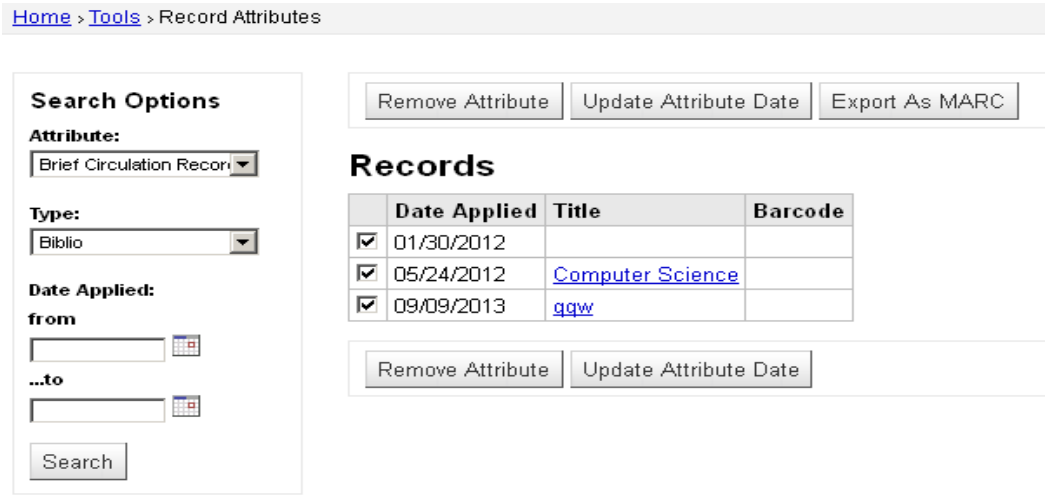
9.3.8.1 Searching, Exporting, Removing Attributes

Under Tools, Record Attributes staff with appropriate permissions can search for records (bibliographic, item, or both) with attributes using the attribute type or the date applied. Enter a beginning date, an end date or a range of dates if the date applied criterion is needed.



Make your selections and click Search; you will get a list of records that match. The list may contain bibliographic or item records, because the attributes may be linked to any of the levels of record. The list will show bibliographic data regardless of what record the attribute is assigned to; it may show item data as well.



From the list, staff may choose matching records from which to remove the attributes, or may update the date applied for some records in the list.

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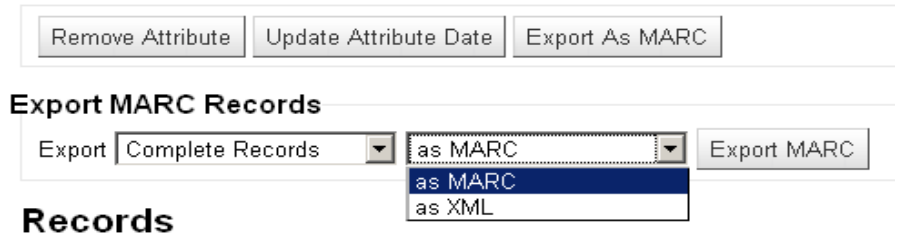
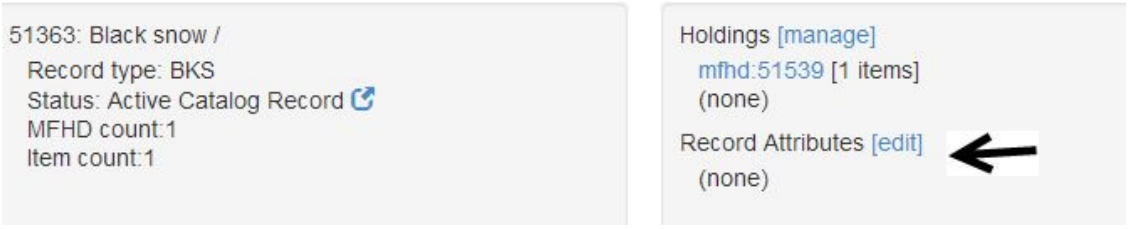
Staff may also export the list in XML format, or export the list as MARC. Click the top-line Export as MARC button and the screen will expand to allow these selections:



If the staff member chooses only to export the records with matching attributes ("only tagged portions" in the pull-down), then bibliographic records will always be exported, but only items that have the matching attribute will be included in the export.

9.3.8.2 Working with Attributes in the Cataloging Editor

When editing or creating a bibliographic record, you can add or remove record attributes by choosing to edit Record Attributes from the box at the top of the bibliographic record display:



A new pop-up box will appear, showing all attributes available. If any attributes are already applied, those will appear on the top. To apply an attribute, click Apply on the checkbox and then click Done. To clear an existing attribute, click Clear.

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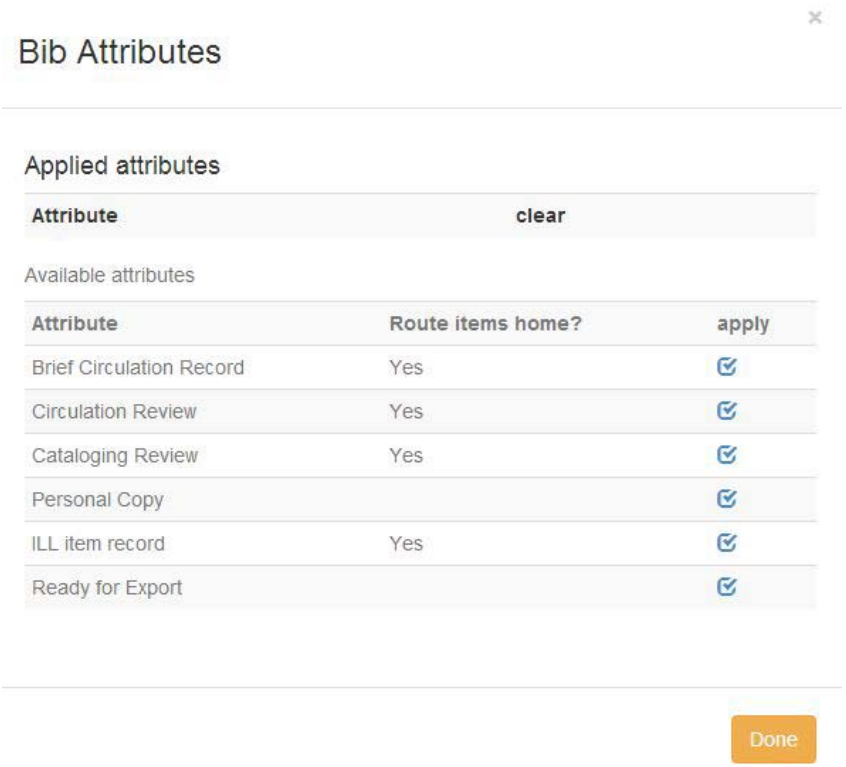
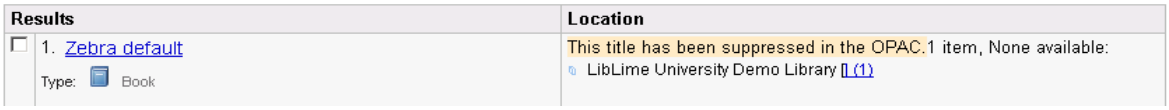


9.3.9 Discovery Layer Suppression

Titles may be suppressed from general view in the Discovery Layer, if desired (syspref OpacSuppression). They are still visible in staff mode. To do so, edit the title record and set the 942 subfield n to a value of 1 (choose Suppressed if the field is linked to a pull-down). After indexing, the record will not be searchable in the Discovery Layer. In staff mode, the results list will show that the title is suppressed:



The staff title details page also will show suppression status:

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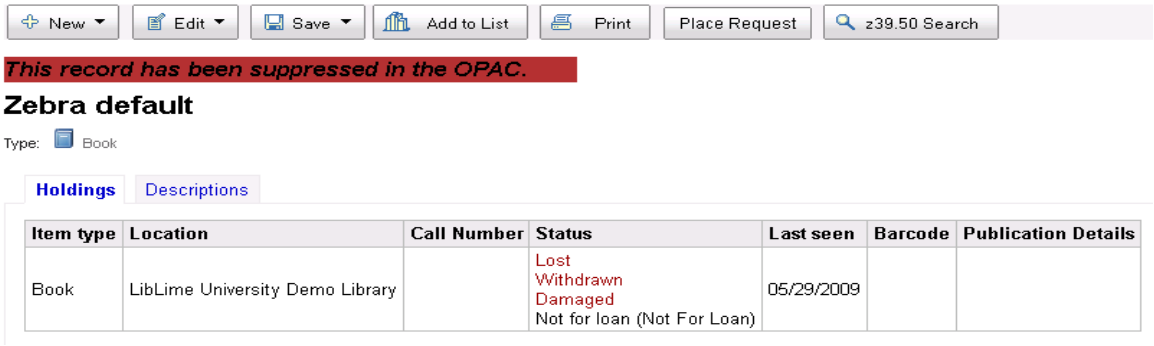
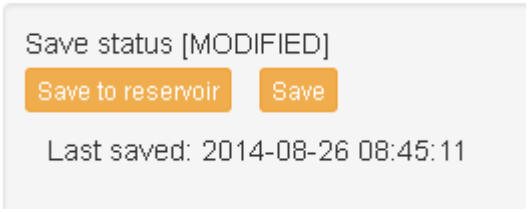
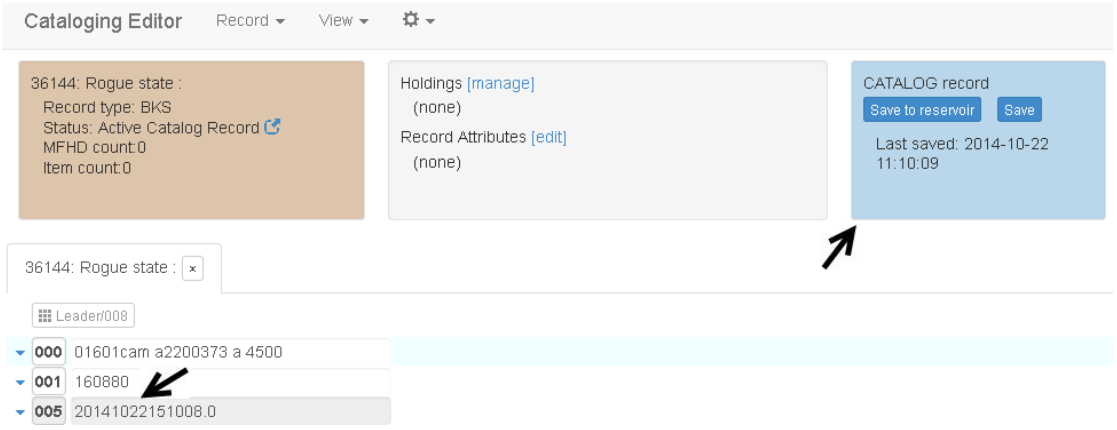


9.3.10 Saving a Bibliographic Record

If there are unsaved changes, the Save Status box at the top will reflect that:



You can choose to save the record to the reservoir for later approval by a senior staff person, or save it directly. When a bibliographic record is saved, the 005 is updated to reflect the date and time saved. The Save status also changes to show the date and time "last saved"



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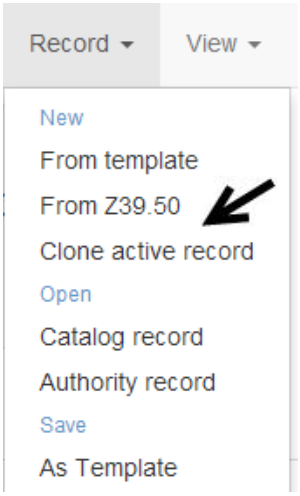
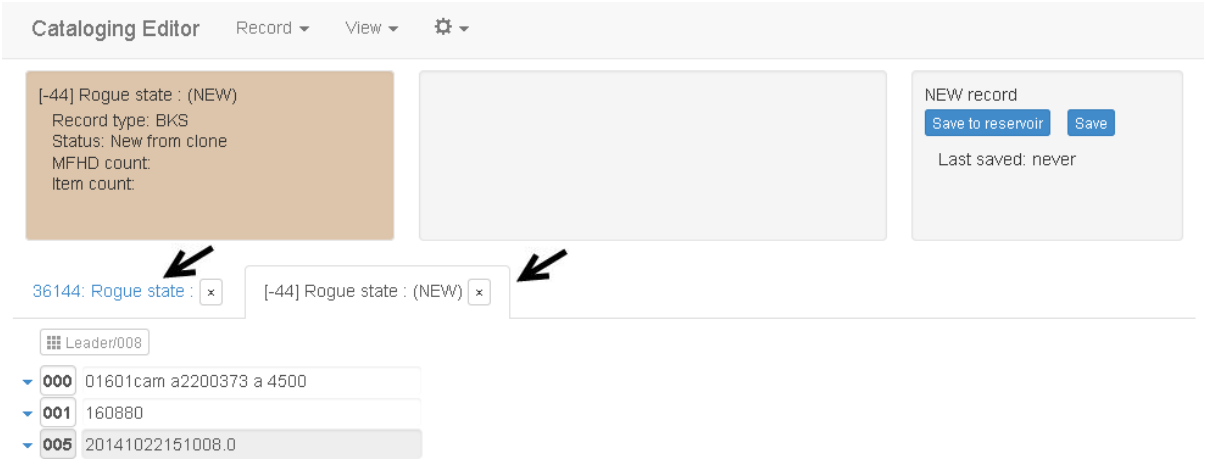
9.3.11 Cloning a Bibliographic Record

You can clone (duplicate) an existing bib record. In the Cataloging Editor, with the record to be cloned open and in a tab, click on the Record menu and choose Clone Active Record.



A copy of the record will appear in the next tab (with a blank biblio number until saved) This cloned record can be edited and saved. Note that item and holding information from the initial record are not cloned; only bibliographic data is copied.



9.3.12 Replacing Record via z39.50 Search

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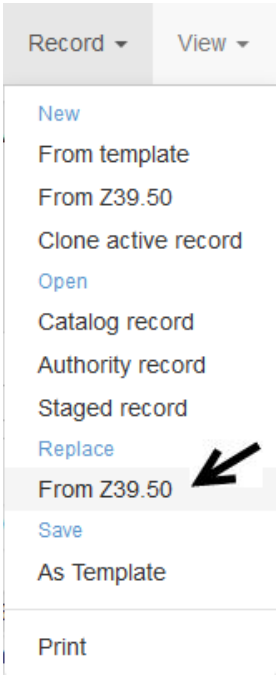
You can replace an existing record with a new one from a z39.50 search if desired. With the record open in the cataloging editor, go under Record and choose Replace from z39.50:



This will open a z39.50 search window; find an appropriate new record in one of your search targets. You will see two options, Open in Tab or Overwrite:

The Overwrite option will replace the existing record in the editor screen. You must then save the record to get the new version. Open in Tab will open the z39.50 version in a new tab, next to the original record. Then go under the View menu and choose Split View to see both:

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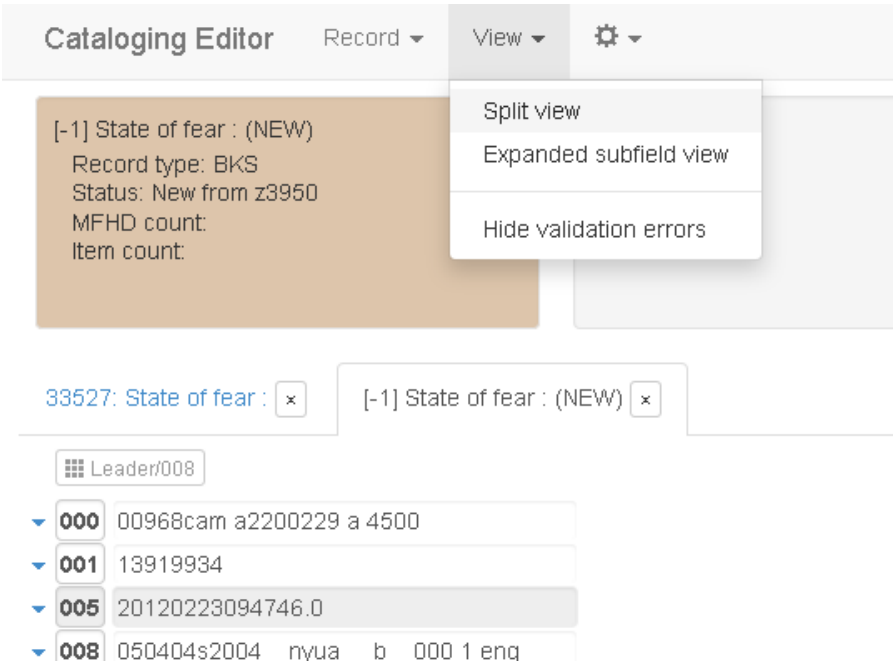
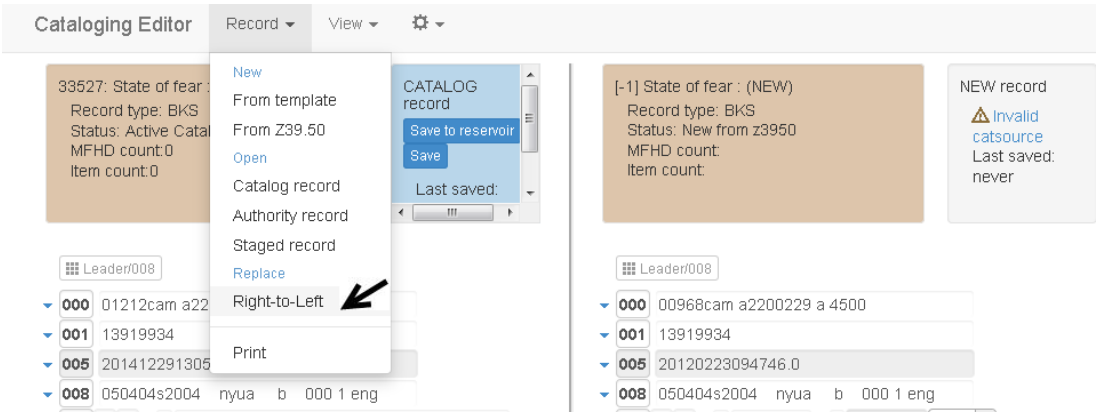
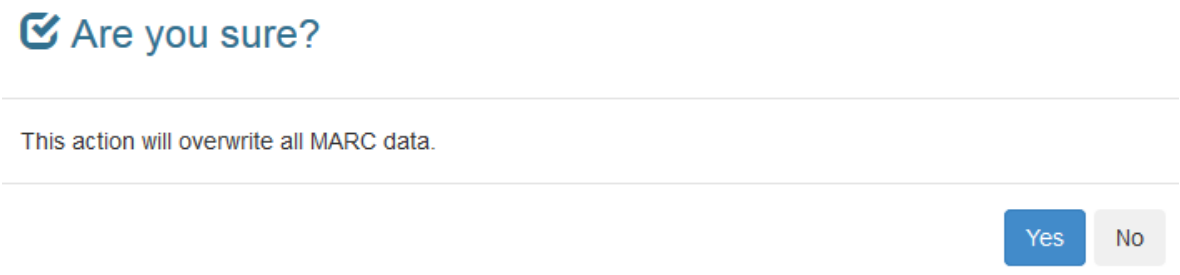


Verify that the new record is what you want. Then go under Record and select Replace Right-to-Left:



This will replace the original record with the new one from the z39.50 search. You will get a prompt asking you to confirm:



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After you confirm the overwrite, you will still see both records in the split view, but now the left-hand record should match the right-hand record. Be sure to save the left-hand record or the new version will not be put into place.

9.3.13 Merging Bibliographic Records

Staff with editcatalogue.bib.merge permission can now merge bibliographic records. Bibliographic elements of the SAVED bib are retained (MARC data is kept) but the SAVED bib inherits the holding and item information from the merged bib and any circulation/hold activity. After the holds and item information have been transferred, the merged bibliographic record that no longer has any items or holds attached will be deleted.

To merge bibliographic records, first identify the bibliographic record to be retained and make a note of its biblio number. Search for the bibliographic record you want to merge and view its bibliographic detail page. From the Edit menu choose Merge Record:

You will get the following screen; enter the biblio number of the record to be retained.

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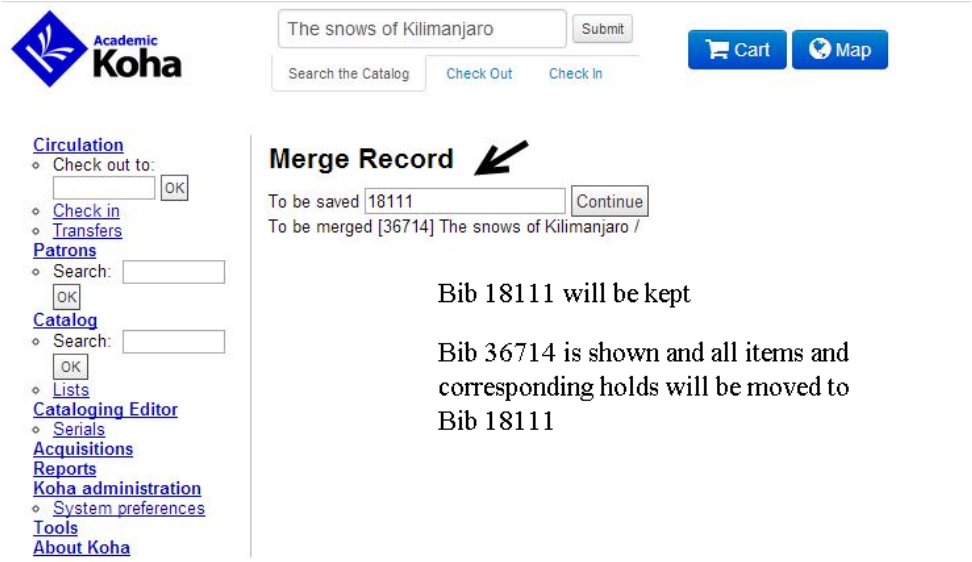
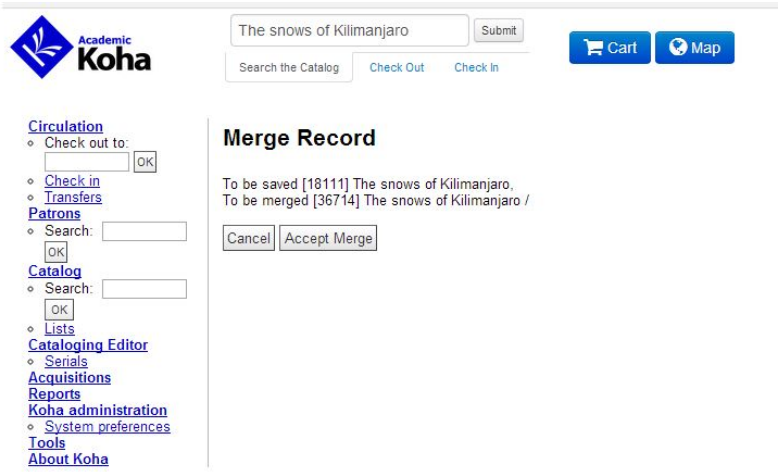


Click Continue and you'll get a confirmation screen. In this example, Bib 36714 will be deleted.



9.3.14 Batch Delete Bibliographic Records

Previous versions included batch edit/delete features for items. This version includes a means of batch deleting bibliographic records, for staff with the appropriate permissions.

Bibliographic records for deletion are identified via standard searching and are placed in the Cart from the search results screen for batch deletion. You can either check the All button at the top, or check individual entries on the results list, then go under Selected and choose Add to Cart.

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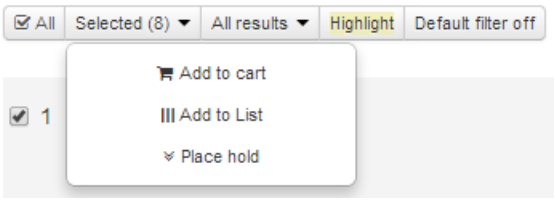
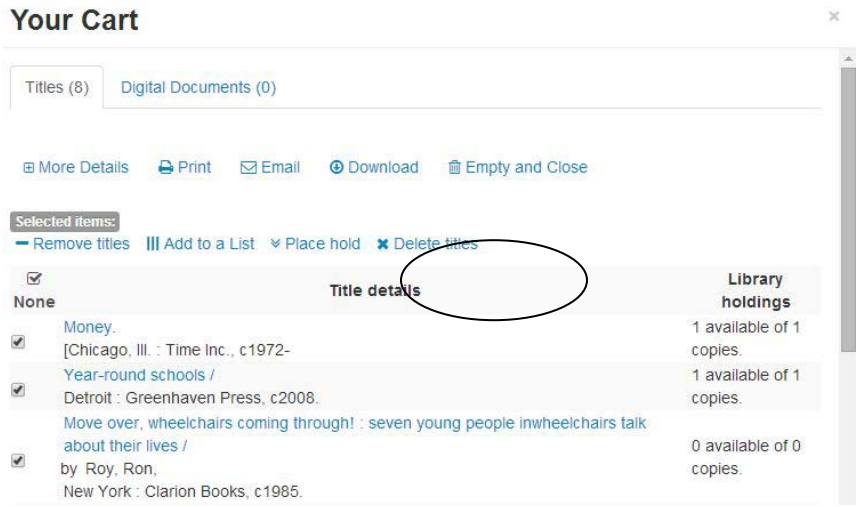


For example, a search for “vacation” returned 8 bib records. All 8 were moved to the Cart from the search results set. Once bibs are in the cart, the cart can be viewed by clicking on the “Cart” icon.

Within the cart, staff with permission to delete bibs via batch delete will see the option Delete titles. Selecting titles from the cart to delete, either by clicking All or choosing individual items by clicking the box to the left of the title. Then click Delete Titles and the selected bibs will be queued up for batch deletion.



Options for how to handle transactional information linked with bibs selected for deletion are provided.

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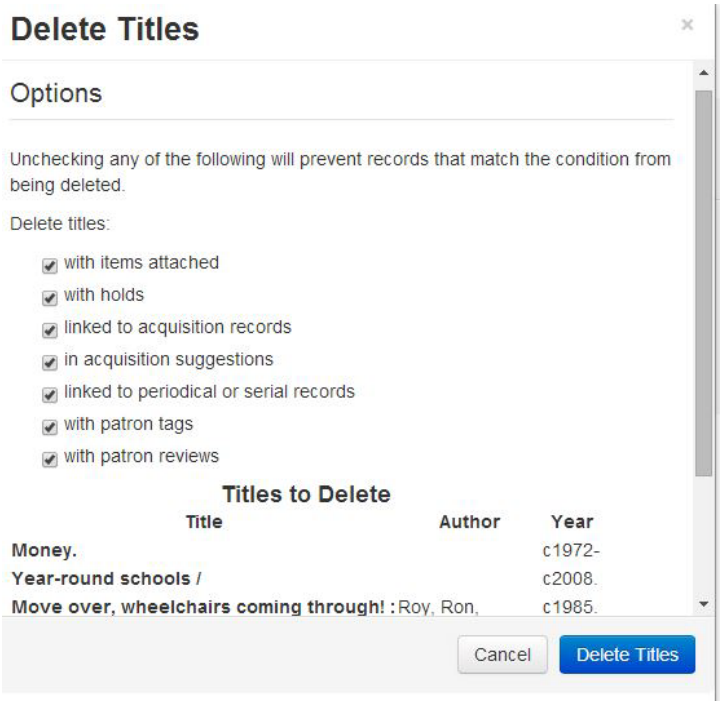
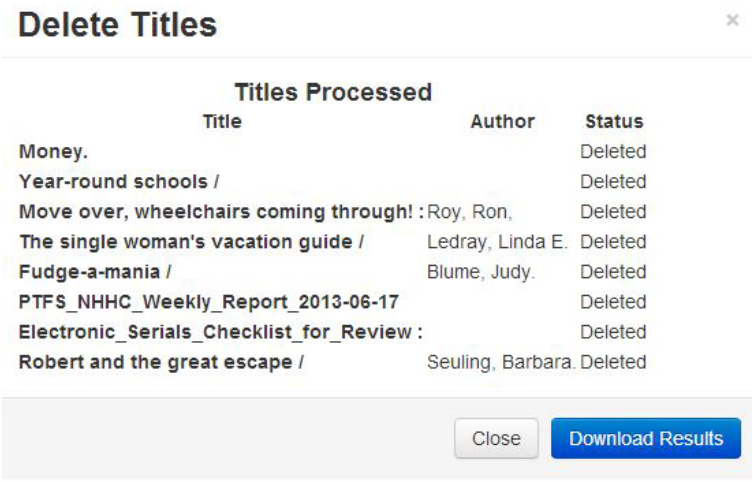


The choices above will be applied to ALL bibs in this batch delete. Clicking Delete Titles will finalize the delete; a confirmation page will appear:



9.3.15 Staging a Record for Review

Additional cataloging permissions have been added so that you can have a cataloging staff with different tiers of permissions. For example, you could allow some staff to stage bibliographic,

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MFHD, or authority records and save them in reservoir, but only allow senior catalogers to search and retrieve those records and commit them to the database.

In the scenario provided below, the cataloger has the following permissions:

View Catalogue (catalogue)
Access staff client & search functions (access)
Borrow books (borrow)
Edit Catalogue
Stage a bibliographic record to an import batch or as an intermediate save
Catsource=TRAVEL only for scope catsource=TRAVEL
Stage a MFHD record to an import batch or as an intermediate save
Catsource=TRAVEL only for scope catsource=TRAVEL
Stage an authority record to an import batch or as an intermediate save
Catsource=TRAVEL only for scope catsource=TRAVEL

Search for a record via Z39.50 and bring the record in to the Cataloging editor. The only option available to this staff person is to "Save to reservoir."

Note that this staff person also only has collection-based (scope source) permission to stage records for materials in the Travel Collection, so no other options show in the 942$x field. (If your site does not use collection-scoped permissions, ignore this setting.)

856 4 2 ‡ 3 Contributor biographical information ‡ u http://www.loc.gov/catdir/enhancements/fy0808/2007052925-b.html
856 4 2 ‡ 3 Publisher description ‡ u http://www.loc.gov/catdir/enhancements/fy0808/2007052925-d.html
942 ‡ x TRAVEL
Travel Collec...
Travel Collection
856 4 1 ‡ 3 Table of contents only ‡ u http://www.loc.gov/catdir/enhancement
t.html

Edit and save the record to the reservoir for review by another staff member by clicking on the Save to Reservoir button.

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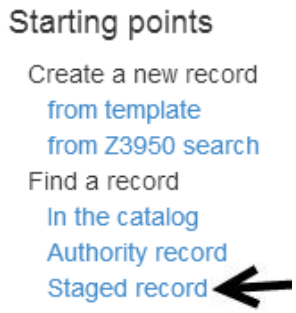
9.3.16 Reviewing and Saving a Staged Record

Following up on the above, a senior cataloger can retrieve, review, and save the staged record. In this scenario provided below, cataloger has the following permissions:

View Catalogue (catalogue)
Access staff client & search functions (access)
Borrow books (borrow)
Edit Catalogue
Manage bibliographic records (all three options beneath/within – update., stage,commit)
Catsource=TRAVEL only for scope catsource=TRAVEL
Manage MFHD records (all three options beneath/within – update., stage,commit)
Catsource=TRAVEL only for scope catsource=TRAVEL
Manage authority records (all three options beneath/within – update., stage,commit)
Catsource=TRAVEL only for scope catsource=TRAVEL

This more senior cataloger will go into the Cataloging Editor and search for a staged record:



You can search for bibs, holdings or authorities, and the search can be narrowed to records saved by “me” or “anyone”:

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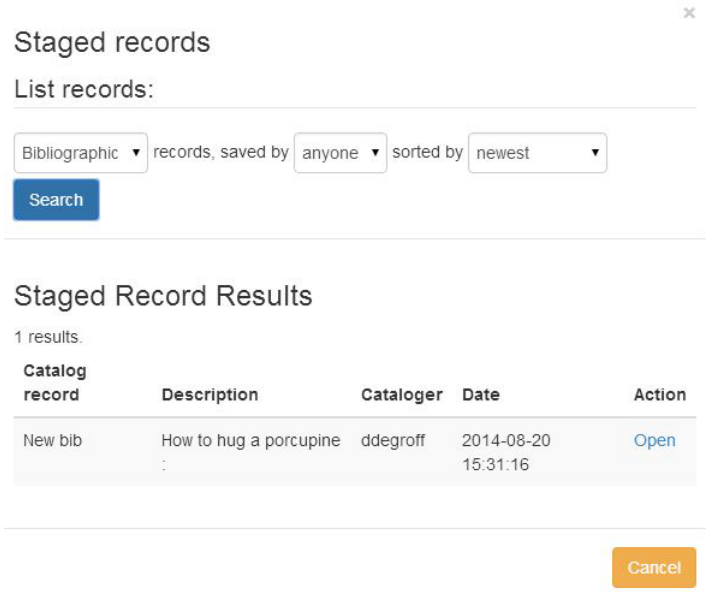

Clicking on the Open link will launch the saved/staged bib in the editor. The cataloger can modify and review the record and, when ready, either save it again to the reservoir OR commit it to the database by choosing either option from the two provided on the top right hand side of bib display:

9.3.17 Link Bibliographic Record to an Authority Record

In either an existing or a new record, you will not be able to edit a field that is under authority control. To link the field to an authority record, from the bibliographic record, click the arrow to the left of the MARC number. Choose Link to Authority:

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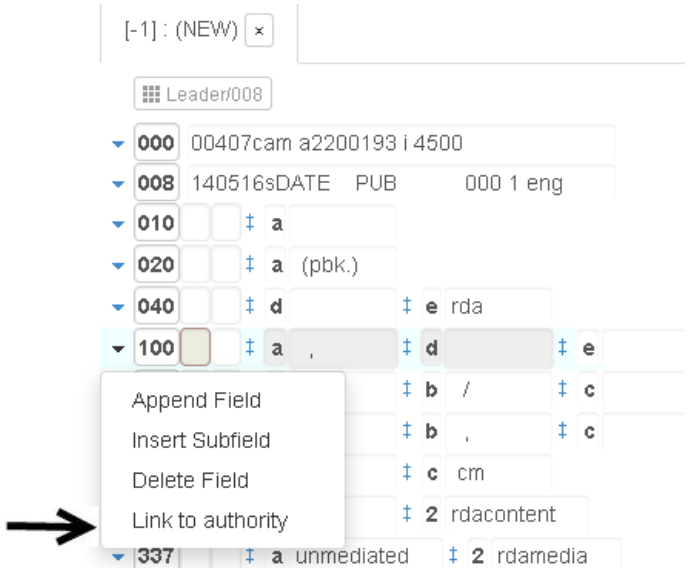
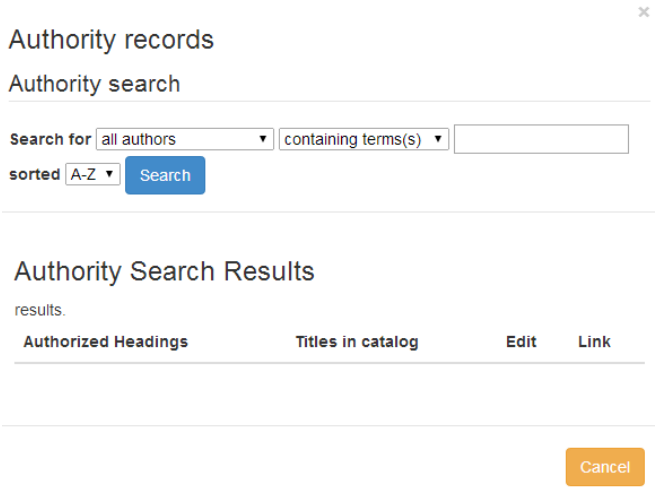

[-1] : (NEW)
Leader/008
000 00407cam a2200193 i 4500
008 140516sDATE PUB 000 1 eng
010 ‡ a
020 ‡ a (pbk.)
040 ‡ d ‡ e rda
100 ‡ a , ‡ d ‡ e
‡ b / ‡ c
‡ b , ‡ c
‡ c cm
‡ 2 rdacontent
337 ‡ a unmediated ‡ 2 rdamedia
Append Field
Insert Subfield
Delete Field
Link to authority

The authority search box will display.



Search for heading desired; all headings meeting the search criteria will be displayed and from the search results page, staff can either edit the heading (by opening it in the editor) or link the heading to the bibliographic record by choosing “Link Authority”.

You can use this process to either link an empty field to an authority record or to change the authority record linked to an existing field.

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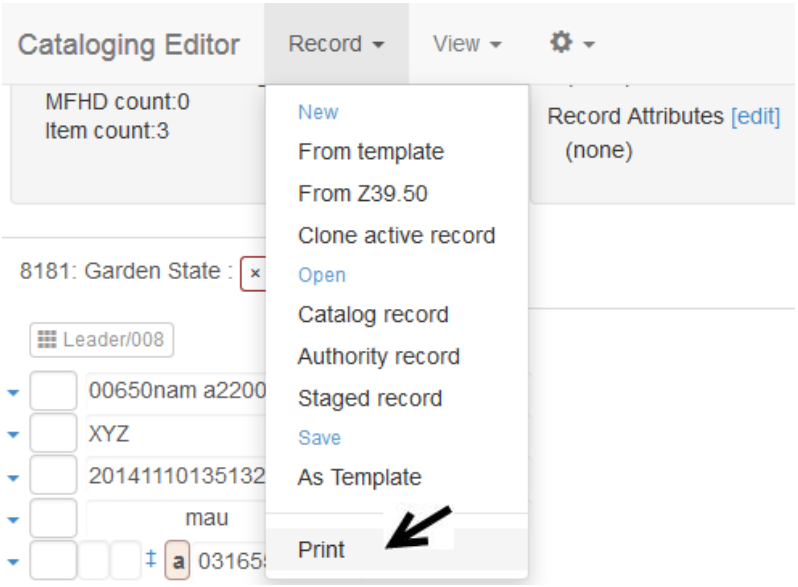
9.3.18 Printing a Bibliographic Record

Within the Cataloging Editor, you can print the full MARC record. Under the Record menu at the top, select Print:



The output will look something like this:

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8181: Garden State :
Record type: BKS
Status: Active Catalog Record
MFHD count:0
Item count:3

000 00650nam a2200229 4500
003 XYZ
005 20141110135132.0
008 mau eng
020 ‡ a 0316557633
035 ‡ a 0000030081
099 ‡ a PS3563.O6537
100 1 ‡ a Moody, Rick. ‡ 0 (XYZ)85259
245 1 0 ‡ a Garden State : ‡ b a novel / ‡ c Rick Moody.
250 ‡ a 1st Back Bay ed.
260 ‡ a Boston : ‡ b Little , Brown, ‡ c c1997.
300 ‡ a xi, 212 p. ; ‡ c 21 cm.
650 0 ‡ a Youth ‡ v Fiction. ‡ 0 (XYZ)85756
650 0 ‡ a Bands (Music) ‡ v Fiction. ‡ 0 (XYZ)85755
653 ‡ a History
774 ‡ o a0000030081 ‡ i parent record to
942 ‡ 2 ddc ‡ c AUDIO ‡ x GRC
999 ‡ c 8181 ‡ d 8181 ‡ f

9.3.19 Linking Parent/Child Records (Host Unit/Constituent Unit)

The system can display links between a parent record (773) and child record (774). The link is made on the subfield o ($o) of each record. If the entry in $o is alphanumeric, the system searches against the ctrlnum index (035$a or 001). If the entry is completely numeric, the system assumes it's a biblionumber and links to the relevant record. A descriptive note can be entered in subfield n if desired. For example, this parent record has three 774 entries for child records:

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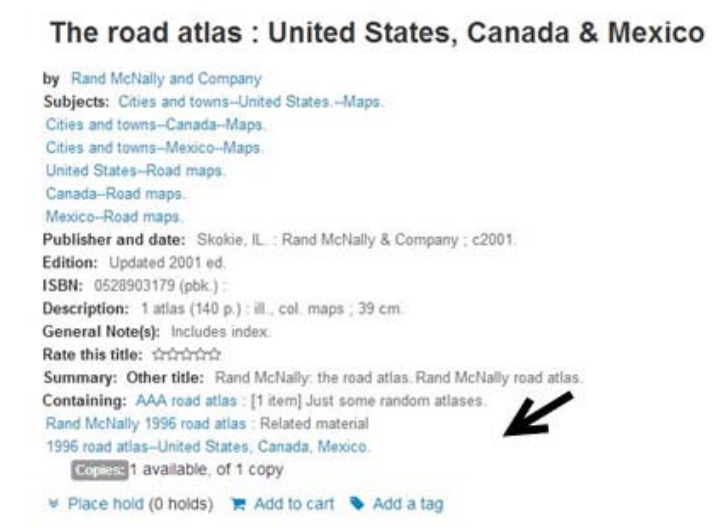
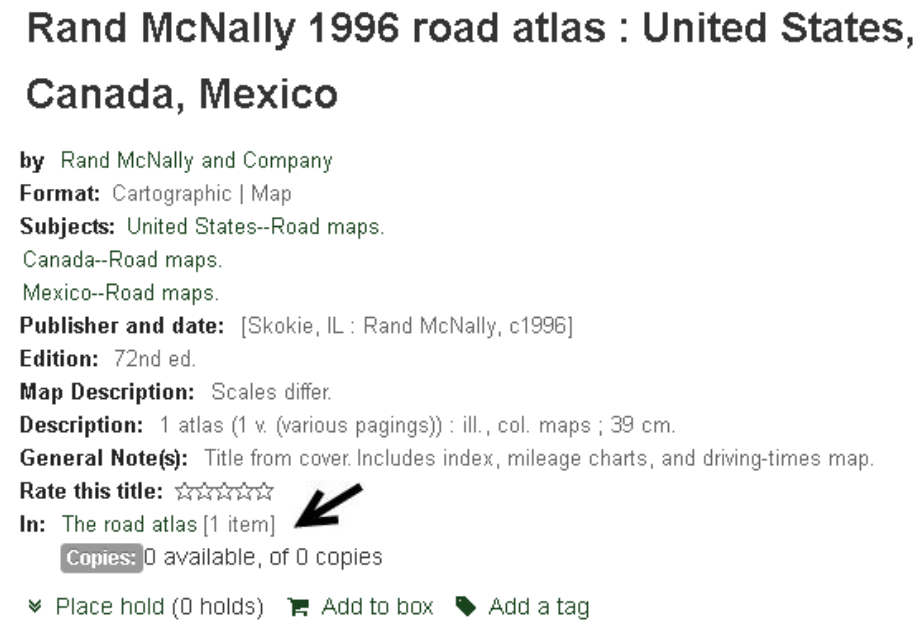

The road atlas : United States, Canada & Mexico
by Rand McNally and Company
Subjects: Cities and towns--United States.--Maps.
Cities and towns--Canada--Maps.
Cities and towns--Mexico--Maps.
United States--Road maps.
Canada--Road maps.
Mexico--Road maps.
Publisher and date: Skokie, IL. : Rand McNally & Company ; c2001.
Edition: Updated 2001 ed.
ISBN: 0528903179 (pbk.) :
Description: 1 atlas (140 p.) : ill., col. maps ; 39 cm.
General Note(s): Includes index.
Rate this title:
Summary: Other title: Rand McNally: the road atlas. Rand McNally road atlas.
Containing: AAA road atlas : [1 item] Just some random atlases.
Rand McNally 1996 road atlas : Related material
1996 road atlas--United States, Canada, Mexico.
Copies: 1 available, of 1 copy
Place hold (0 holds)
Add to cart
Add a tag

The 774 entries look like this:

651 0 ‡ a Canada ‡ v Road maps. ‡ 0 (XYZ)87295
651 0 ‡ a Mexico ‡ v Road maps. ‡ 0 (XYZ)87296
774 0 8 ‡ o 253 ‡ n Just some random atlases.
774 0 8 ‡ o 16373 ‡ i Related material
774 1 ‡ o 143

(Note that the third entry does not have a $n descriptive note, so the title display just shows the linked title.)

Each of the child records, in turn has a 773 entry linking to the parent record:


Rand McNally 1996 road atlas : United States, Canada, Mexico
by Rand McNally and Company
Format: Cartographic | Map
Subjects: United States--Road maps.
Canada--Road maps.
Mexico--Road maps.
Publisher and date: [Skokie, IL : Rand McNally, c1996]
Edition: 72nd ed.
Map Description: Scales differ.
Description: 1 atlas (1 v. (various pagings)) : ill., col. maps ; 39 cm.
General Note(s): Title from cover. Includes index, mileage charts, and driving-times map.
Rate this title:
In: The road atlas [1 item]
Copies: 0 available, of 0 copies
Place hold (0 holds)
Add to box
Add a tag

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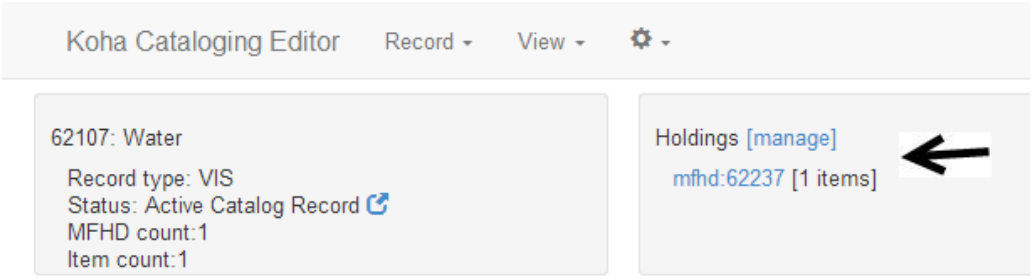
The record's 773 looks like this:

9.4 Managing Holdings Records

The system now has full support for the MARC21 Format for Holdings Records. **MARC holdings records** contain the holdings information—what copies are owned and where they are held—for bibliographic items in both physical and electronic forms."[1] These are primarily used for serial records; they are not required for all records.

The hierarchy is that a bib record links to a holdings record, which links to item(s) records. There can be multiple holdings records and/or item records per title.

Prior to this version, holdings data was displayed in a comparable but non-MARC compliant format, called Summary Records. Upon upgrade to the current version, all existing summary records are converted to proper MFHD records. In the Cataloging Editor, when a bibliographic record is displayed, if a MFHD is available, it can also be displayed. The holdings area of the record header has a link to the MFHD. Click Manage to display the MFHD along with item details.



Click on the "mfhd #####" link to view the holdings record. This image shows the bibliographic record (62107 'Water') with the MFHD next to it in another tab (MFHD 62237).

[1] http://www.loc.gov/marc/umh/UMHpt1-6.html#pt1

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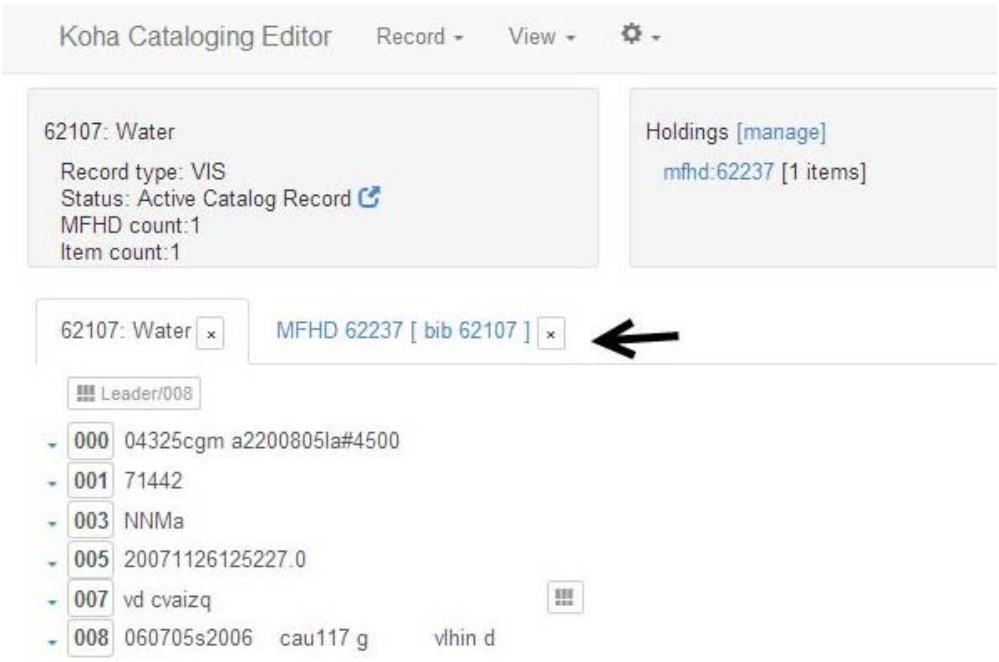
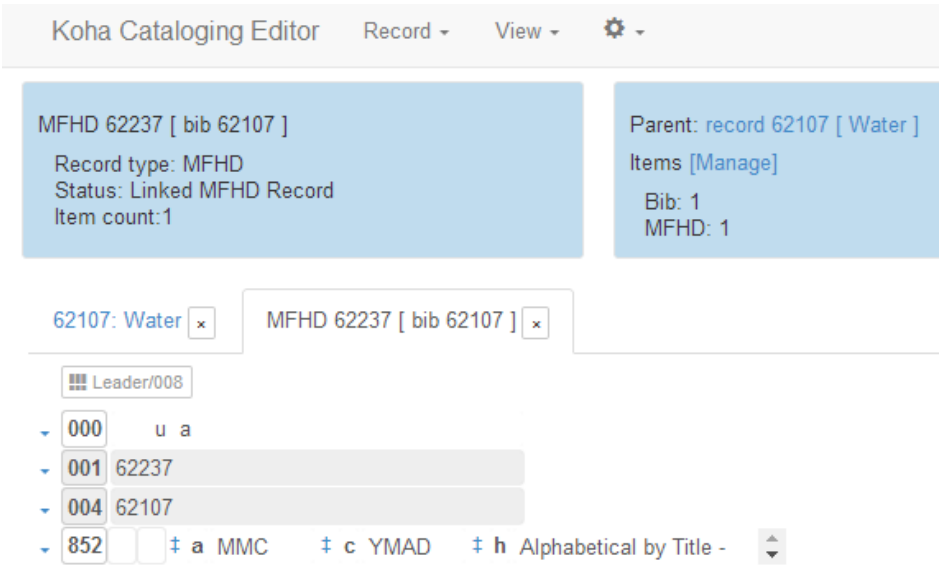


In a holdings record display, the header box has a different display. The background is blue (as opposed to gray for a bibliographic record or yellow for an authority record). The record type is MFHD and the status is Linked MFHD record. The display has a link to the parent bib record and to any items attached.



You can edit and save the holdings record as needed from the catalog editor. Note that the display shows that there is one bib and one MFHD on this particular title.

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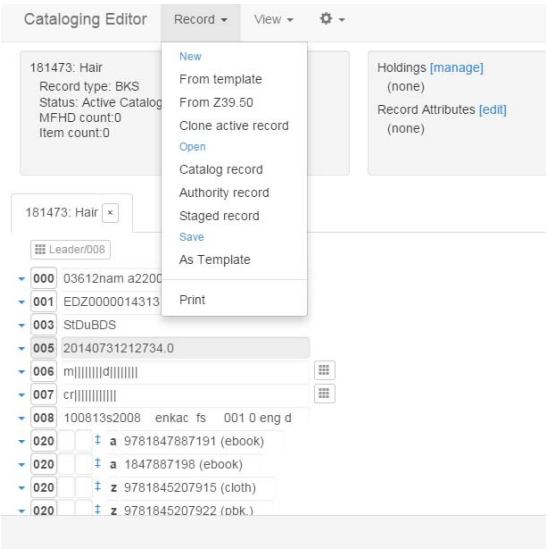
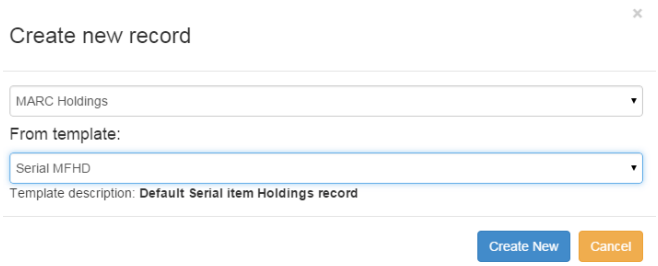
9.4.1 Creating a Holding Record

To add a new holding record to a bibliographic record, you must first have the bib record open in the cataloging editor. Click on Record / New/ From template and pick the correct "Holding" template from the templates offered.





The empty template will open in a new tab; enter data as desired and save holding record. The link between the newly created holding record and the bib will be created.

9.4.2 Viewing a Holding Record

Note that in the MFHD display, the box atop the page has a blue background:

MFHD #; followed by linked bib number	Link to Parent (bib) and some metadata about it	Save Status Date of last edit
Record type	Link to item(Manage link will direct to an edit screen)	
Active Status		
Item count	Summary of bibs and items linked to this MFHD	

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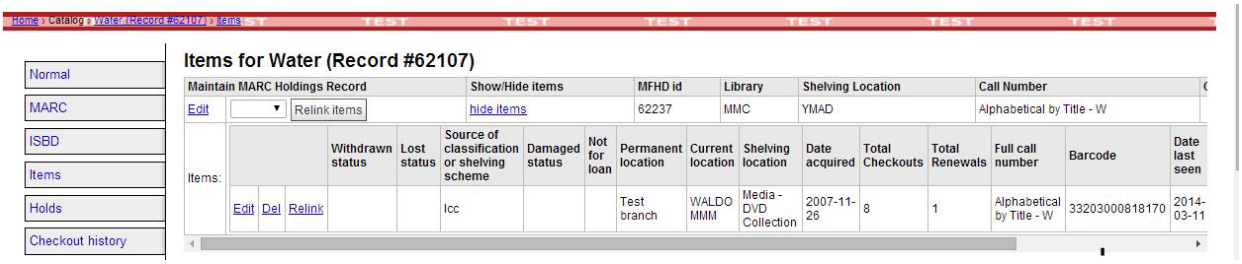
To see further details about the MFHD and the item records, click “Manage” and the MFHD and item details will display as shown below:



When and if a MFHD needs to be deleted; the first step is to either delete OR unlink items linked to the MFHD; if the items are unlinked they WILL remain linked to bib. Linking of MFHD to items is done at the item level.

9.5 Managing Item Records

Items can be attached to a title record. Sites may choose to not add items for certain types of titles, such as electronic resources, but having an item record can make it easier to search. Any physical item that circulates must have an item record.

9.5.1 Create an Item

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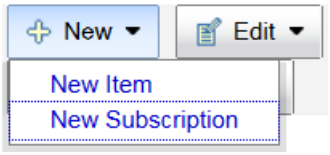
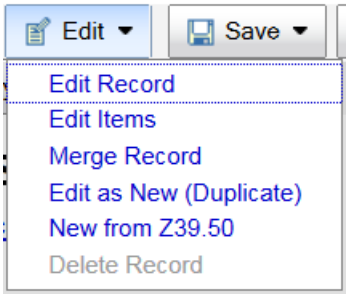
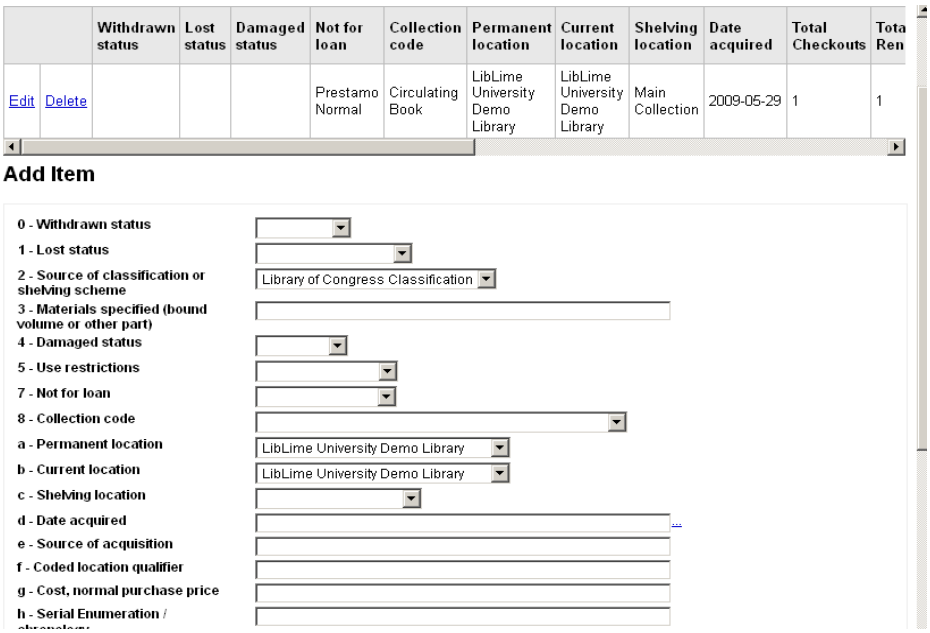
You can create items outside the Cataloging Editor. Search for an existing bibliographic record and display it. Click New, New Item.



You could also click Edit, Edit Items:



In either case, the Add Items screen will display. The default entry is for a new item, but existing items show at the top and can be edited by clicking the Edit link.



To add a new item to this bibliographic record, add data into the data entry page displayed. At minimum, you MUST select a permanent and current location (these are branch codes) and an item type. You probably will want to enter other data such as a call number, barcode, and replacement price. When the data entry is complete, scroll to the bottom of the page and choose

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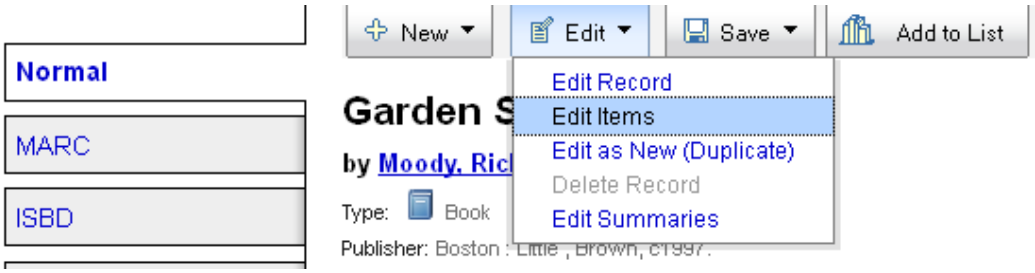
Add Item. If desired for multiple copies of the same title, staff can duplicate the item just created by choosing Add & Duplicate, or they can create multiple copies of the item by choosing Add Multiple Copies.

If Add Multiple Copies is chosen, an additional box will appear into which the number of copies can be set:

The system will create that many copies, incrementing the original barcode sequentially.

9.5.2 Edit an Item Record

To edit an existing item, click Edit, Edit Items:



The Add Items screen will display. The default entry is for a new item, but existing items show at the top. If you click the Edit link, the information for that item populates the data form:

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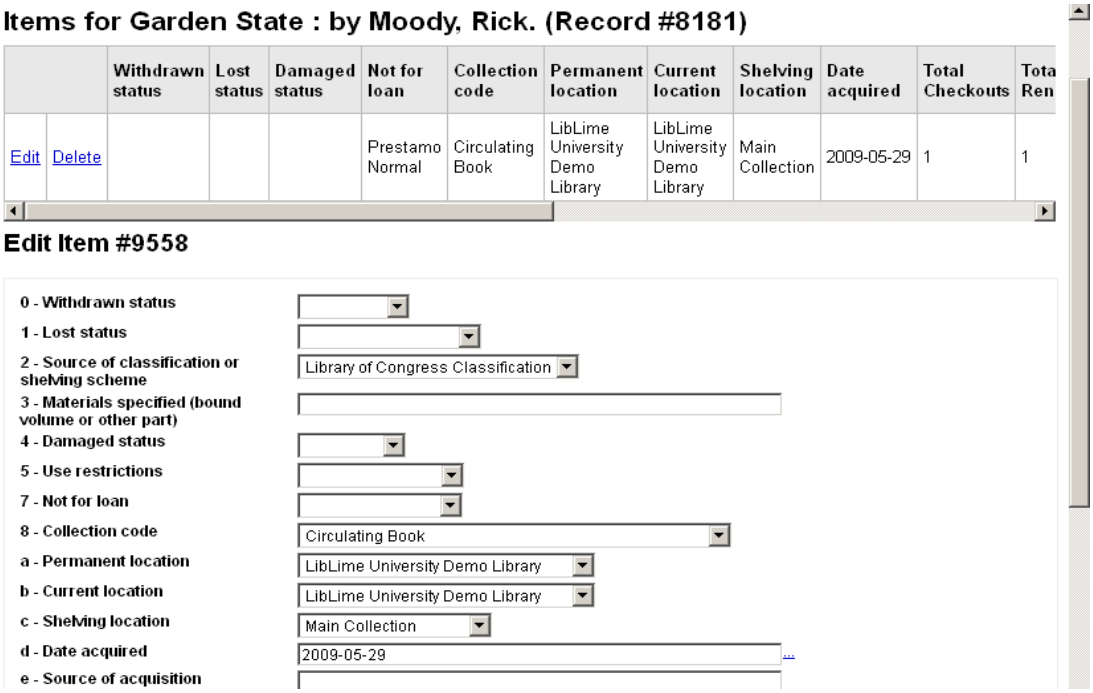
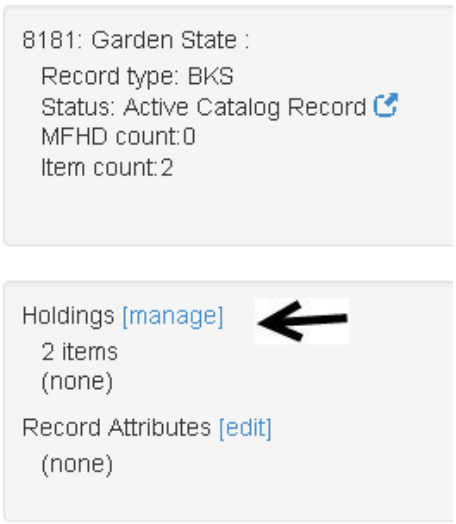


Make the desired changes and click the Save Changes button at the bottom.

You can also reach item records from the Cataloging Editor. Click the Manage link next to items:



You'll be taken to the same Item View/Edit screen:

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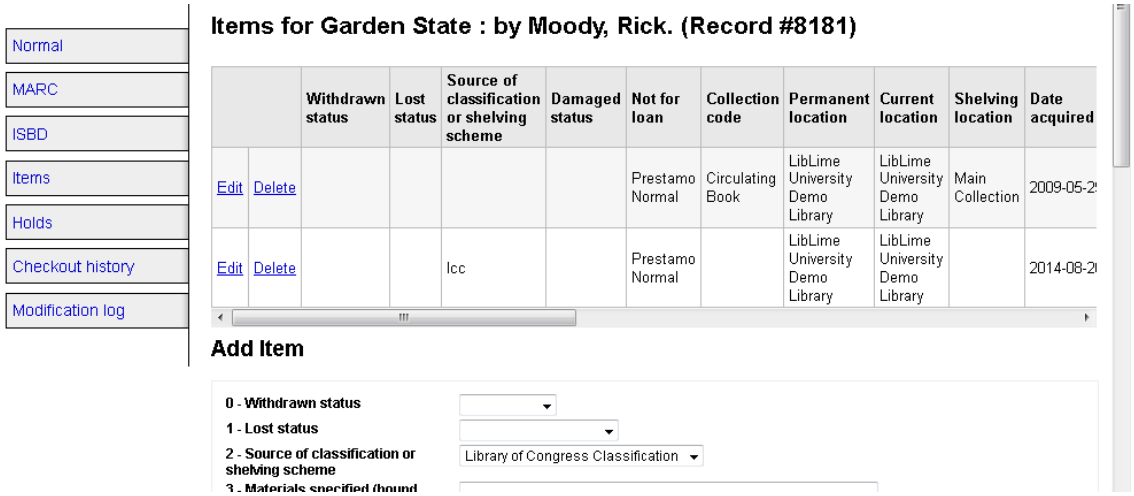

Edit the item as above, and save it.

If there are MARC holdings records attached, you'll see those links. You can also choose to link the items to a different holdings record with the Relink Items button or the link next to the item:

Note that if you choose Edit under Maintain MARC Holdings Records you will be taken to the Cataloging Editor.

9.5.3 Delete Item(s)

You can delete an individual item by clicking the Delete link next to it at the top of the Edit Items screen. You can also delete multiple items in one pass by clicking the check box next to the items:

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Items for United States code annotated. (Record #20526)

Select all/none for deletion		Item	Withdrawn status	Lost status	Damaged status	Not for loan	Collection code	Permanent location	Current location	Shelving location	Date acquired	Serial Enumeration / chronology
☑	Delete	Edit					Reference book	LibLime University Demo Library	LibLime University Demo Library	Reference Collection	2009-05-29	42:407-603a
☑	Delete	Edit					Reference book	LibLime University Demo Library	LibLime University Demo Library	Reference Collection	2009-05-29	42:405-406
☑	Delete	Edit					Reference book	LibLime University Demo Library	LibLime University Demo Library	Reference Collection	2009-05-29	42-300cc-404
☑	Delete	Edit					Reference book	LibLime University Demo Library	LibLime University Demo Library	Reference Collection	2009-05-29	300e-300bb-8
☑	Delete	Edit					Reference book	LibLime University Demo Library	LibLime University Demo Library	Reference Collection	2009-05-29	290aa-300d-
☑	Delete	Edit					Reference book	LibLime University Demo Library	LibLime University Demo Library	Reference Collection	2009-05-29	42:257-290b

When you have selected the item(s) to be deleted, click the Delete Items button and those items will be removed.

9.5.4 GUIDE/UUID Item Fields

Certain sites want to create a GUIDE/UUID unique identifier for each item. Provision has been made for this in subfields in the item record. If your site uses this, $S is the site ID code (based off a default entry in the authorized value GUIDE_SITE), and $i is the system-generated UUID. If you leave those subfields blank, the system will auto-generate the values. You can also enter specific values for already-existing identifiers.

By default, the display of the GUIDE/UUID is hidden in the staff and Discovery Layer bib display; to enable the Discovery Layer display, put this .css code in the Discovery Layer Configuration Editor Inline Styles section:

```
table.items .guide {
display: table-row;
}
```


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Put this code in the IntranetUserCSS syspref for staff display:

```
table .guide {
display: table-row;
}
```

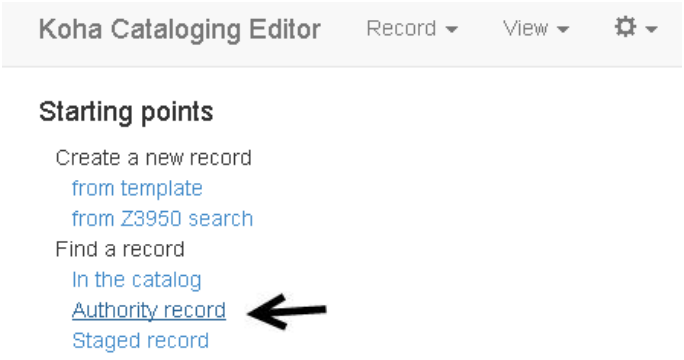
Most sites will not use this feature; leave the display turned off and ignore $S and $i in the item record edit screen.

9.6 Managing Authority Records

Much of this was covered in the section on managing bibliographic records above. However, authority records can be searched, edited, and saved without going through the bibliographic record.

9.6.1 Searching for authority records

From the staff client, launch the Cataloging Editor. From Starting Points, Find a record, select Authority Record.



A search window will appear; enter your search term and any options (type of authority, containing or starting with the search term).

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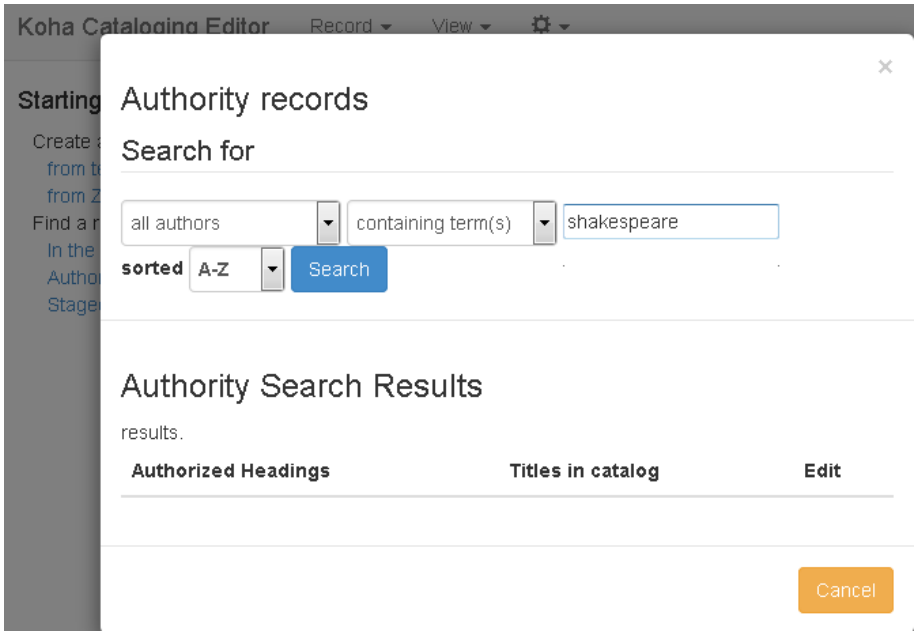
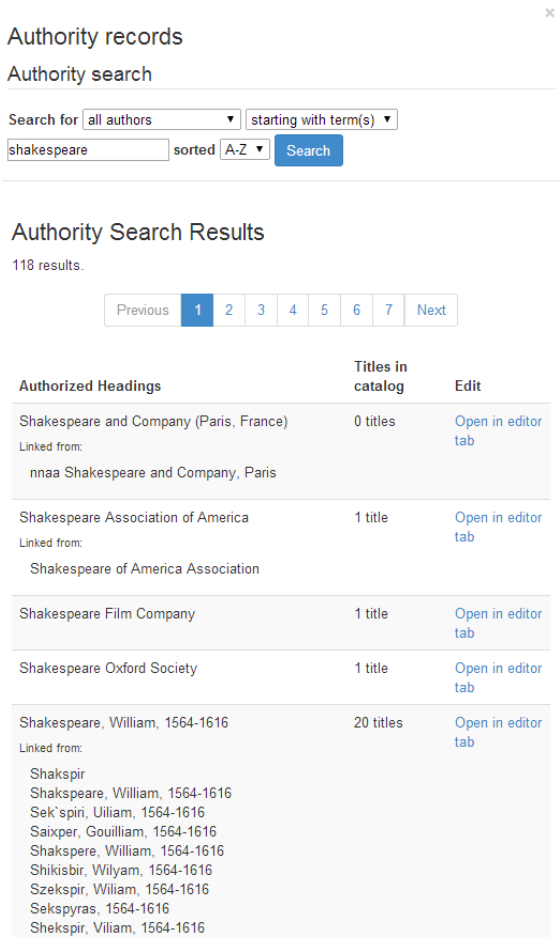


Search results will show in the window underneath the display of the search terms.



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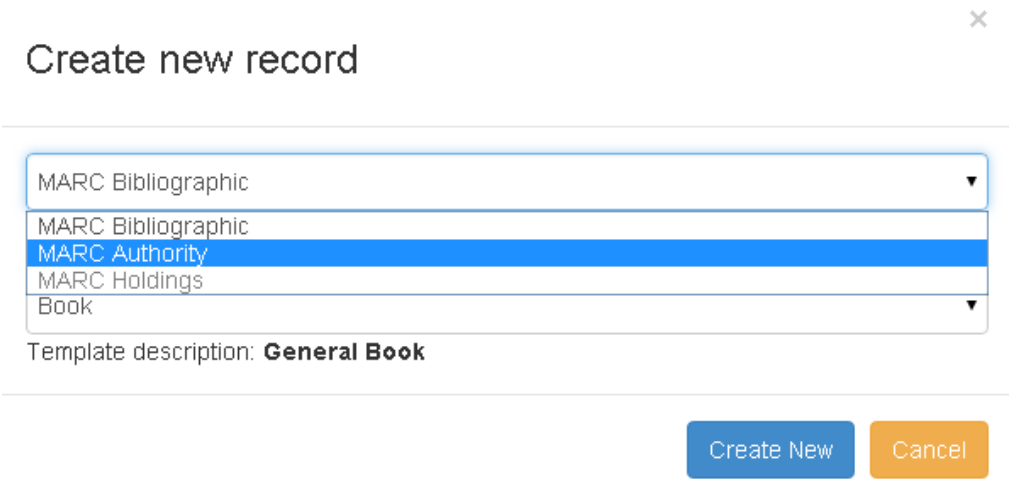
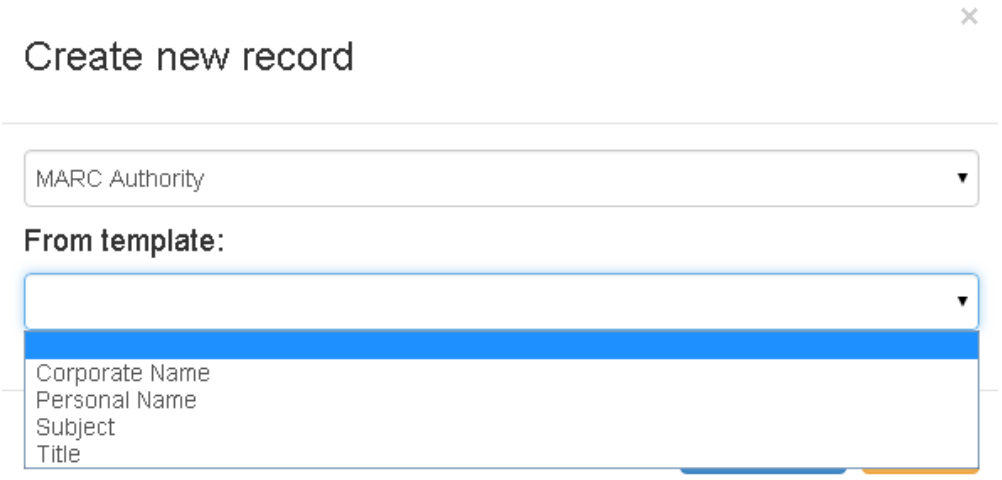
The above image shows a search for any authority starting with “Shakespeare”. The search results display lists the heading, and shows how many titles in the system are using it. It also has a link to open the heading in the Cataloging Editor.

9.6.2 Creating Authority Records

You can create a new authority record from scratch in the Cataloging Editor. Create a new record from template, then, in the pop-up, choose MARC Authority from the first pulldown:



In the second pulldown, select the type of authority to be created (personal name, subject, etc.):



Then click the Create New button and an empty record will open in the Cataloging Editor.

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9.6.3 Editing Authority Records

When you open the link in the Cataloging Editor, the display is similar to editing a bib record. Move the cursor to the field to be edited and type your desired text. At the top of the authority record itself extensive information about this record is conveyed on this page in a summary box (yellow background for authority records). You'll see the status, how many bibs use this authority, and whether changes need saving.

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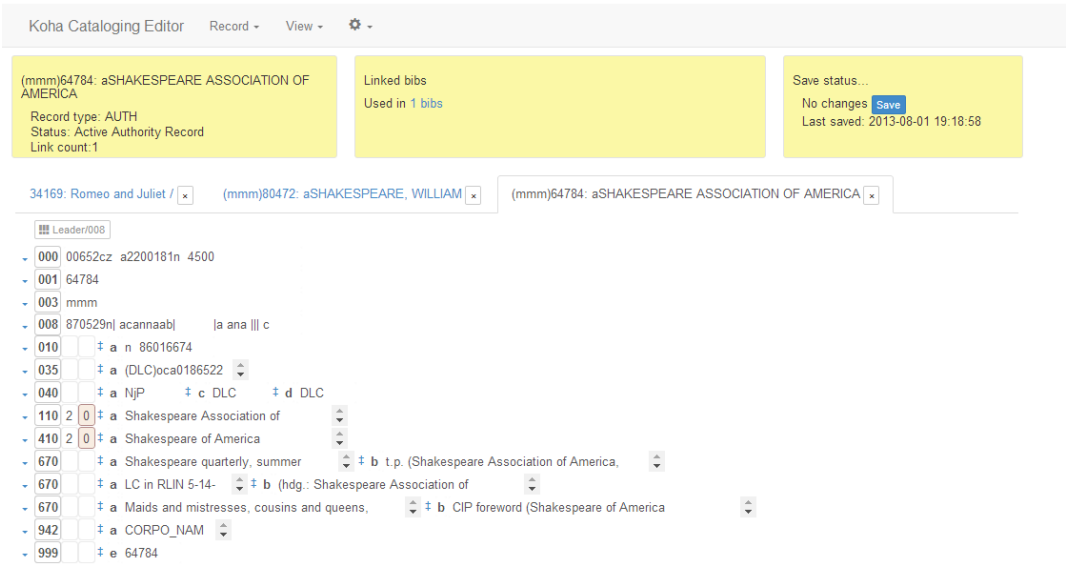
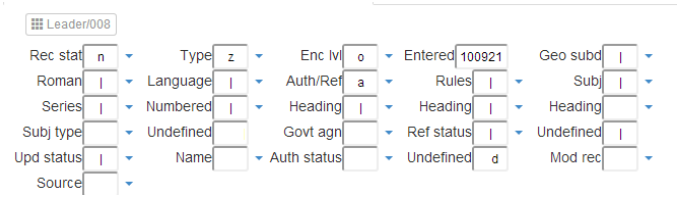
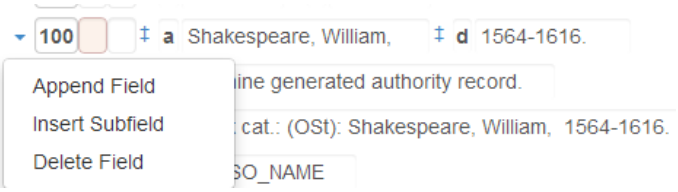

Koha Cataloging Editor
Record
View
(mmm)64784: aSHAKESPEARE ASSOCIATION OF AMERICA
Record type: AUTH
Status: Active Authority Record
Link count:1
Linked bibs
Used in 1 bibs
Save status...
No changes
Save
Last saved: 2013-08-01 19:18:58
34169: Romeo and Juliet /
(mmm)80472: aSHAKESPEARE, WILLIAM
(mmm)64784: aSHAKESPEARE ASSOCIATION OF AMERICA
Leader/008
000 00652cz a2200181n 4500
001 64784
003 mmm
008 870529n| acannaab| |a ana ||| c
010 ‡ a n 86016674
035 ‡ a (DLC)oca0186522
040 ‡ a NjP ‡ c DLC ‡ d DLC
110 2 0 ‡ a Shakespeare Association of
410 2 0 ‡ a Shakespeare of America
670 ‡ a Shakespeare quarterly, summer ‡ b t.p. (Shakespeare Association of America,
670 ‡ a LC in RLIN 5-14- ‡ b (hdg.: Shakespeare Association of
670 ‡ a Maids and mistresses, cousins and queens, ‡ b CIP foreword (Shakespeare of America
942 ‡ a CORPO_NAM
999 ‡ e 64784

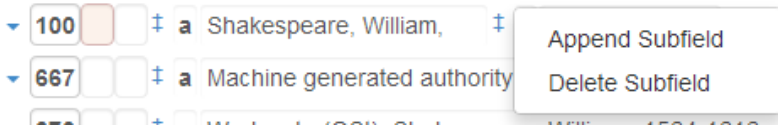
To edit to Leader (000) and the 008, click on the Leader008 tag. The Cataloging editor opens up the Leader in an interactive box (shown below). Clicking on any of the arrows to the right of each entry shows the full list of options for each spot in the Leader and 008.



To append or delete a field or to add a new subfield, click on the arrow just to the left of the field to be edited; a list of options will display.



To append or delete a subfield, click on the image just to the left of the subfield and a menu will display



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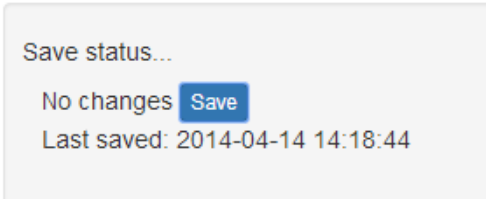
Changes can be saved by clicking on the SAVE option to the top right hand side of the Cataloging Editor; staff can save a record and have it remain open so that during the process of editing, they can save their work. The system displays the last edit date and time.



After saving, the reindexing and relinking of heading to all relevant bibs may take up to 10 minutes as the indexing catches up.

9.6.4 Importing Authority Records

Authority records are now imported through the same tool and in the same manner as bibliographic records. See that section above.

Authorities must be imported as a separate file, not mixed in with bibliographic records. Records to be imported must be in UTF8 format. This format is established when exporting the authority records from the source. Please check with the provider of your authority records if you have any questions on this step.

After uploading the file, note that you MUST specify that the records are authority records:

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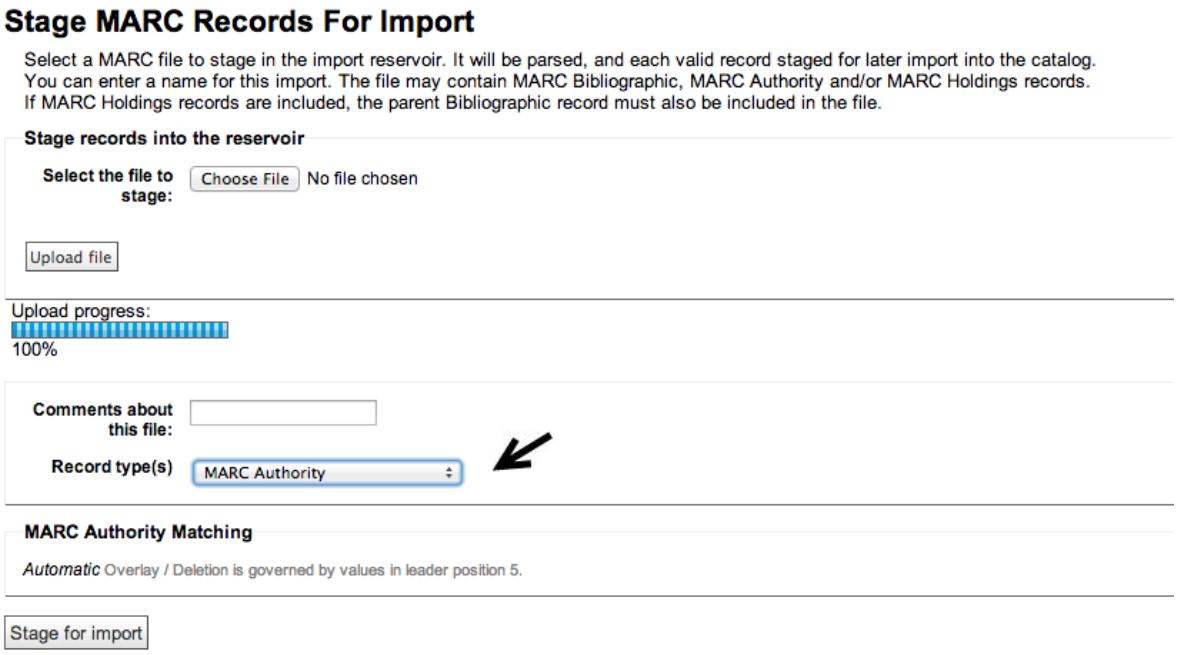
Stage MARC Records For Import
Select a MARC file to stage in the import reservoir. It will be parsed, and each valid record staged for later import into the catalog.
You can enter a name for this import. The file may contain MARC Bibliographic, MARC Authority and/or MARC Holdings records.
If MARC Holdings records are included, the parent Bibliographic record must also be included in the file.
Stage records into the reservoir
Select the file to stage:
Choose File
No file chosen
Upload file
Upload progress:
100%
Comments about this file:
Record type(s)
MARC Authority
MARC Authority Matching
Automatic Overlay / Deletion is governed by values in leader position 5.
Stage for import

Making this selection removes the inappropriate item selection fields seen in the earlier bib import section.

Matching/overlay for authority records is governed by leader position 5:

- Setting to 'd', 's' or 'x' will DELETE the authority record from Koha.
- Setting to 'n' will add new.
- Setting to 'c' will overwrite the existing authority.

Matching is done on the RCN number.

9.6.5 Merging Authority Records

Two authority records can be merged together. This is done through the old Authorities interface, not the Cataloging Editor. All of the authorized fields on the linked bibs of the removed authority records are automatically linked to the surviving authority record and the $0 subfields RCN numbers are updated. From the staff home page, under the Cataloging section click on Authorities:

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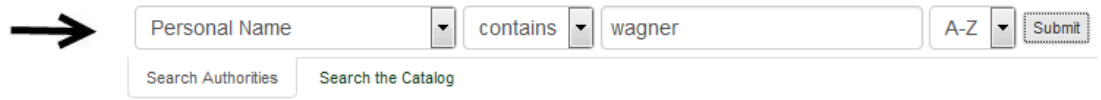
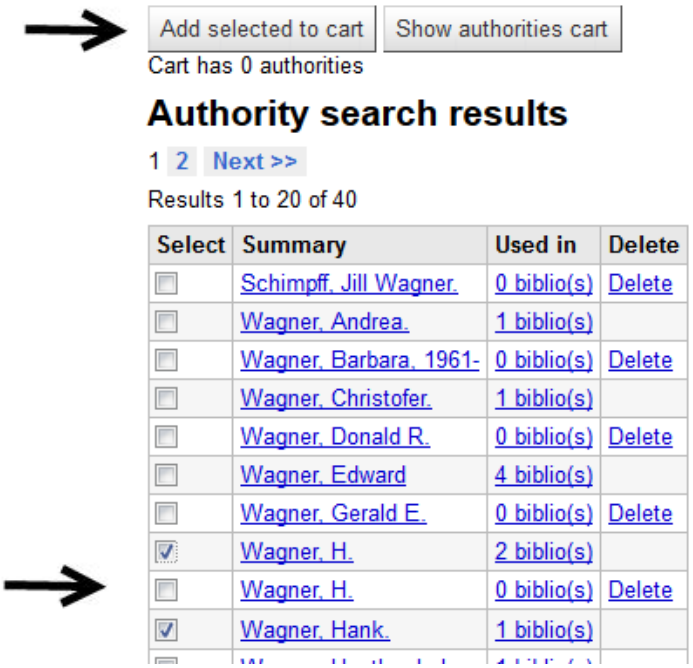
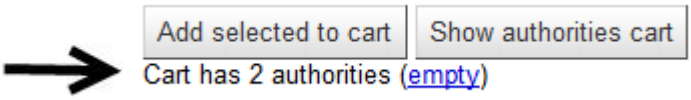
Search for the authority term(s):



Select the ones you want and click the Add Selected to Cart button:



The cart counter updates to show how many records were added. Click the Show Authorities Cart button to continue.



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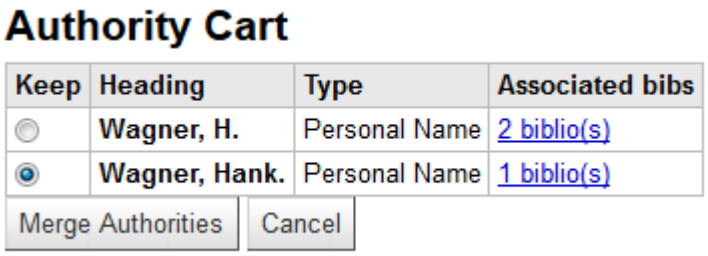
A new screen opens with your records listed. Click the radio button next to the one you want to keep, and then click Merge Authorities.

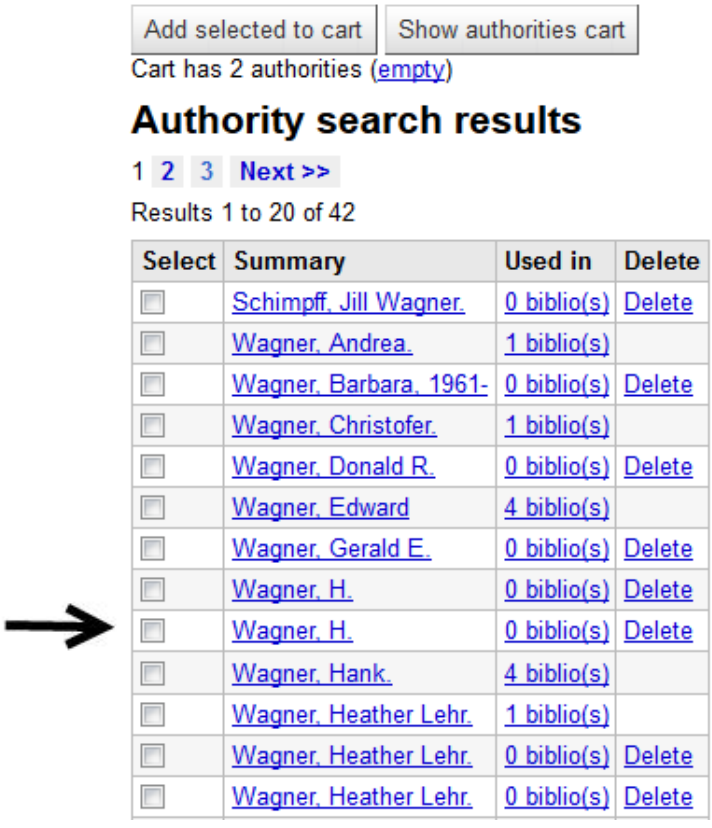


Authority Cart

Keep	Heading	Type	Associated bibs
○	**Wagner, H.**	Personal Name	2 biblio(s)
◉	**Wagner, Hank.**	Personal Name	1 biblio(s)

Merge Authorities | Cancel

That heading will be kept and any bibs attached to the other heading will be transferred to the one you choose to keep. The Cart window will close. Back on the authorities search screen, you may need to wait a few minutes for the indexing to catch up with the changes. Then refresh your browser to see the results – the count of associated bibs should increase on the record you kept, and the other one should show zero. At this point, you can empty your borrower cart and delete the second record.



Add selected to cart | Show authorities cart

Cart has 2 authorities (empty)

Authority search results

1 2 3 Next >>

Results 1 to 20 of 42

Select	Summary	Used in	Delete
☐	Schimpff, Jill Wagner.	0 biblio(s)	Delete
☐	Wagner, Andrea.	1 biblio(s)	
☐	Wagner, Barbara, 1961-	0 biblio(s)	Delete
☐	Wagner, Christofer.	1 biblio(s)	
☐	Wagner, Donald R.	0 biblio(s)	Delete
☐	Wagner, Edward	4 biblio(s)	
☐	Wagner, Gerald E.	0 biblio(s)	Delete
☐	Wagner, H.	0 biblio(s)	Delete
☐	Wagner, H.	0 biblio(s)	Delete
☐	Wagner, Hank.	4 biblio(s)	
☐	Wagner, Heather Lehr.	1 biblio(s)	
☐	Wagner, Heather Lehr.	0 biblio(s)	Delete
☐	Wagner, Heather Lehr.	0 biblio(s)	Delete

(Note that in the above screenshot another unrelated record had been linked to the Wagner, Hank entry in the meantime, increasing the count to four.)

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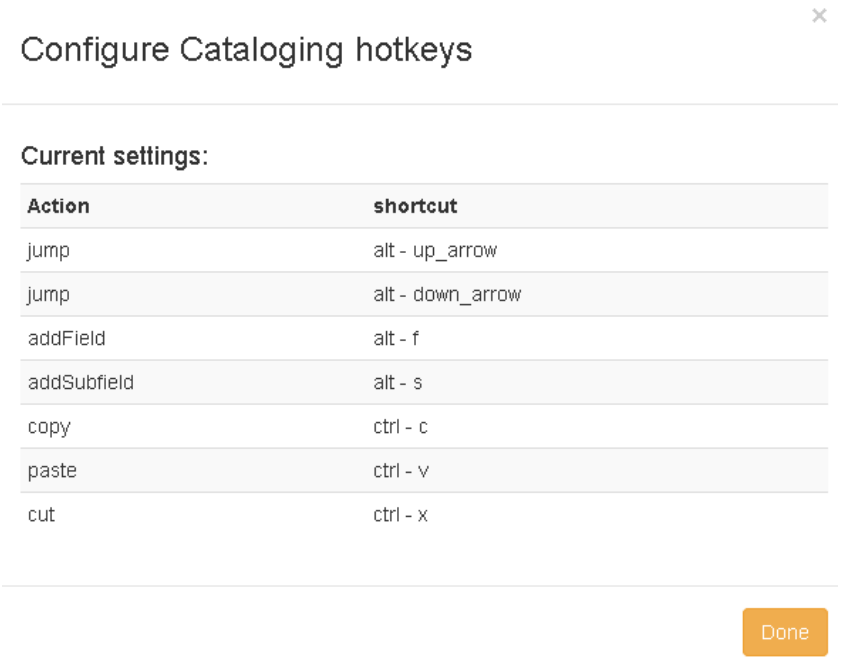
9.7 HotKeys

Certain key strokes or hotkeys are configured to streamline cataloging. You can see available hotkeys in the Cataloging Editor; go under the gearbox (Settings) menu and choose Hotkeys:

A pop-up window shows existing settings; these are not configurable by users at present.



9.8 Authorized Values

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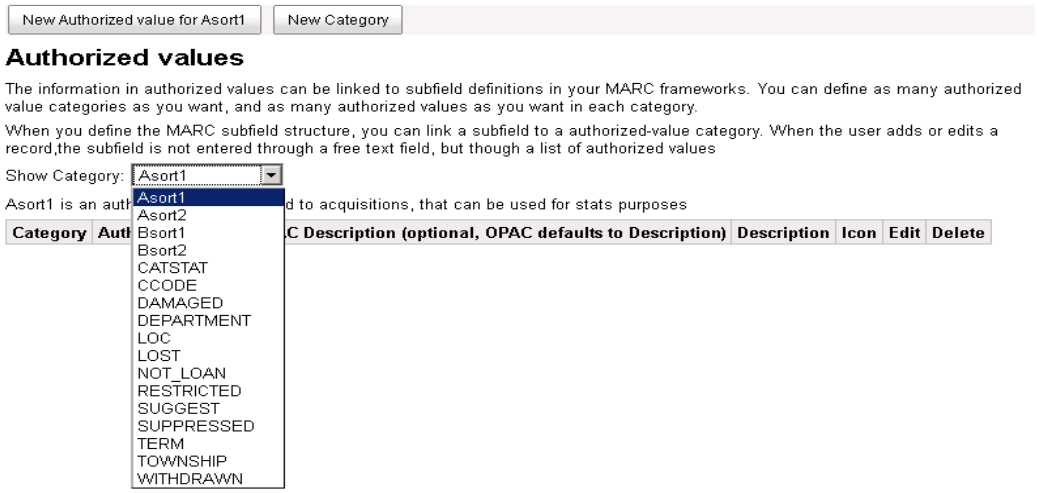
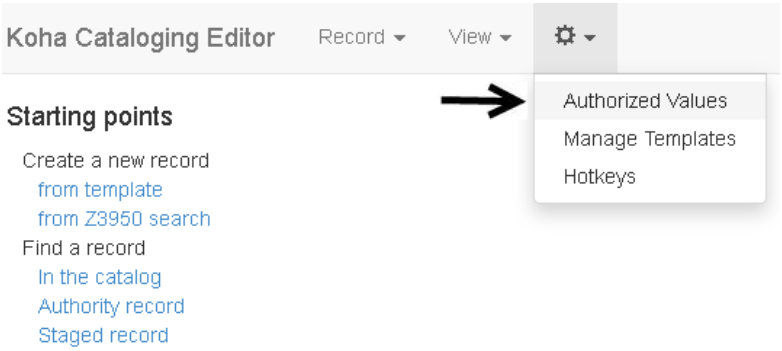
Authorized values are a collection of policies with defined values. They have very different uses (shelving locations, cataloging attributes, etc.) but are created in the same way. Under Administration, Authorized Values staff with permission to access that area can click the pull-down to see the categories that have been established already:


New Authorized value for Asort1
New Category
Authorized values
The information in authorized values can be linked to subfield definitions in your MARC frameworks. You can define as many authorized value categories as you want, and as many authorized values as you want in each category.
When you define the MARC subfield structure, you can link a subfield to a authorized-value category. When the user adds or edits a record,the subfield is not entered through a free text field, but though a list of authorized values
Show Category: Asort1
Asort1
Asort2
Bsort1
Bsort2
CATSTAT
CCODE
DAMAGED
DEPARTMENT
LOC
LOST
NOT_LOAN
RESTRICTED
SUGGEST
SUPPRESSED
TERM
TOWNSHIP
WITHDRAWN
Category
Description
Icon
Edit
Delete

Using the Cataloging Editor, authorized values can be linked to a MARC field and subfield. Click the gearbox (Settings) menu and choose Authorized Values:



In this screen shot two authorized values have been established – linking a bib field / subfield to an authorized list:

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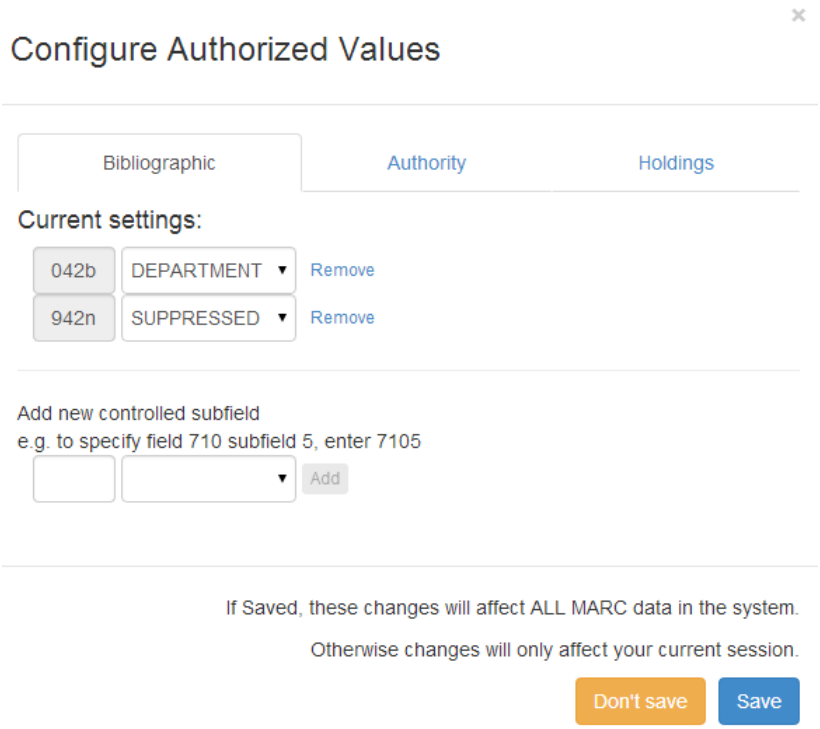

To set up more, a staff member can type the MARC field and subfield in the blank box and then choose the desired authorized value list from those provided.

With the 942$n setting, when a bib is edited or created, the 942$n will show the authorized list for suppressed records:

Authorized value links can be set for the entire system, or just for the current record.

9.9 Batch Edit Items

The DLS has two utilities for making global changes to records. Which one is used is set in the configuration (syspref BatchEditOrModifyItems). The options are Edit or Modify. Modify allows batch editing of items only. Edit allows changes to items and includes a search option.

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For both, if deleting the last item on the title, the user can also opt to delete the title record itself. Both utilities are found on the Tools menu, but only one can be active at a time. System administrators can switch between them if needed.

There is no Undo for batch edit – be very careful with your selections. Experiment in a test environment first to be sure you understand the process.

9.9.1 Batch Modify Utility

Go to Tools, Batch Modify Item Records. This brings up a setup screen with options.

WARNING: Be Careful. There is no Undo for the Batch Modify Item Utility!
1. Specify Item Fields to Modify
Item Type LEAVE UNCHANGED
Collection Code LEAVE UNCHANGED
Shelving Location LEAVE UNCHANGED
Holding Library LEAVE UNCHANGED
Home Library LEAVE UNCHANGED
Not for Loan LEAVE UNCHANGED
Damaged LEAVE UNCHANGED
Item Lost LEAVE UNCHANGED
Item Withdrawn LEAVE UNCHANGED
Call Number Source LEAVE UNCHANGED
Item Notes
Price
Replacement Price
Itemcallnumber
2. Specify Options
Delete Items
If Deleting Items, Delete Holdings and Biblio if Last Item
3. Modify One Item By Barcode
Enter item barcode:
Submit
Or Modify Item Batch By Barcode or Itemnumber
Enter item identifiers below, one per line (no commas, max length 5,000 characters):
Barcodes
Itemnumbers
Submit

You can specify item fields to modify and modify either a single barcode or to search for a range of barcodes. This utility requires you to have a list of the barcodes to be modified prior to beginning the modify process. The utility does not feature a search tool.

On the left side of the screen, make your selections for the changes needed. For example, to change item type, use that pull-down to select the new one. You can also set damaged, lost, or withdrawn status, or change other item fields.

On the right side of the screen, indicate whether the changes should delete items. If deleting the last item from a title, you can also opt to delete the title record as well.

When you have made your selections, either input a single barcode or use the lower-right corner box to input a series of either barcodes or itemnumbers. The actions will only be taken on the specified records. Click Submit to make the changes.

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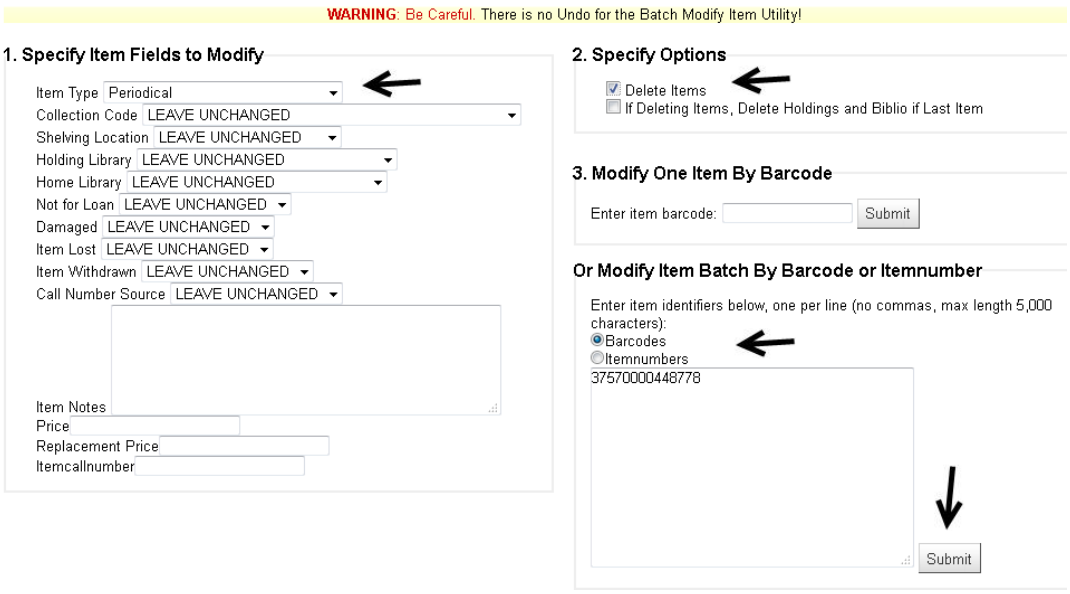
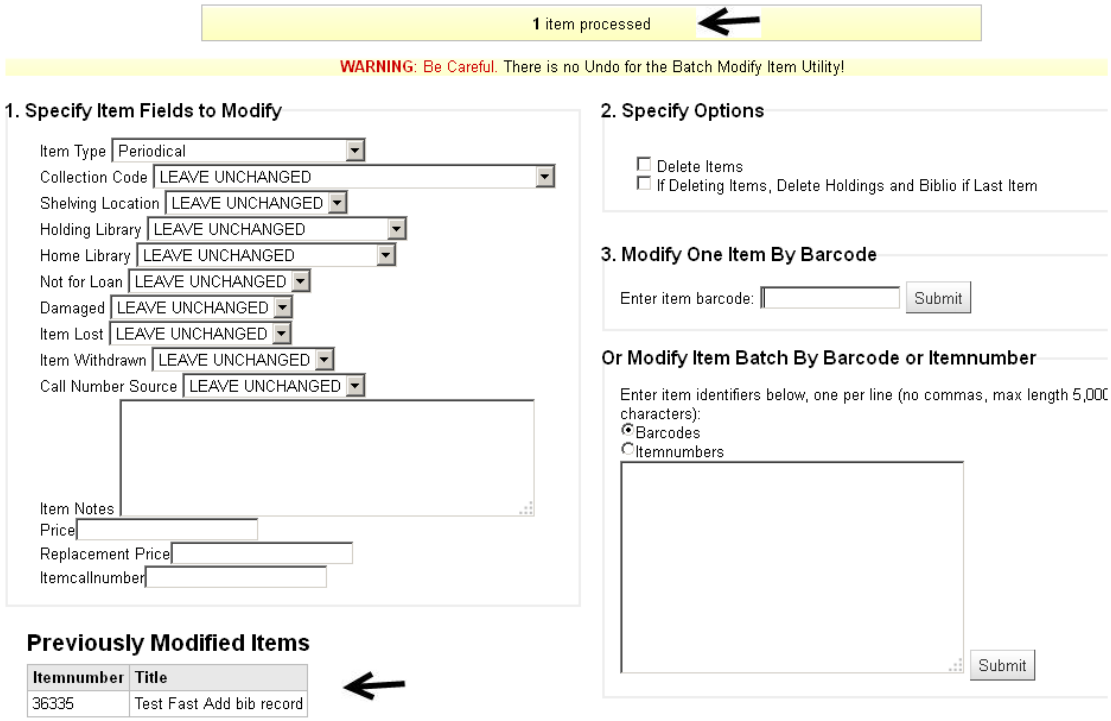

WARNING: Be Careful. There is no Undo for the Batch Modify Item Utility!
1. Specify Item Fields to Modify
Item Type Periodical
Collection Code LEAVE UNCHANGED
Shelving Location LEAVE UNCHANGED
Holding Library LEAVE UNCHANGED
Home Library LEAVE UNCHANGED
Not for Loan LEAVE UNCHANGED
Damaged LEAVE UNCHANGED
Item Lost LEAVE UNCHANGED
Item Withdrawn LEAVE UNCHANGED
Call Number Source LEAVE UNCHANGED
Item Notes
Price
Replacement Price
Itemcallnumber
2. Specify Options
Delete Items
If Deleting Items, Delete Holdings and Biblio if Last Item
3. Modify One Item By Barcode
Enter item barcode:
Submit
Or Modify Item Batch By Barcode or Itemnumber
Enter item identifiers below, one per line (no commas, max length 5,000 characters):
Barcodes
Itemnumbers
37570000448778
Submit

The screen will refresh, with updates about what actions were taken:



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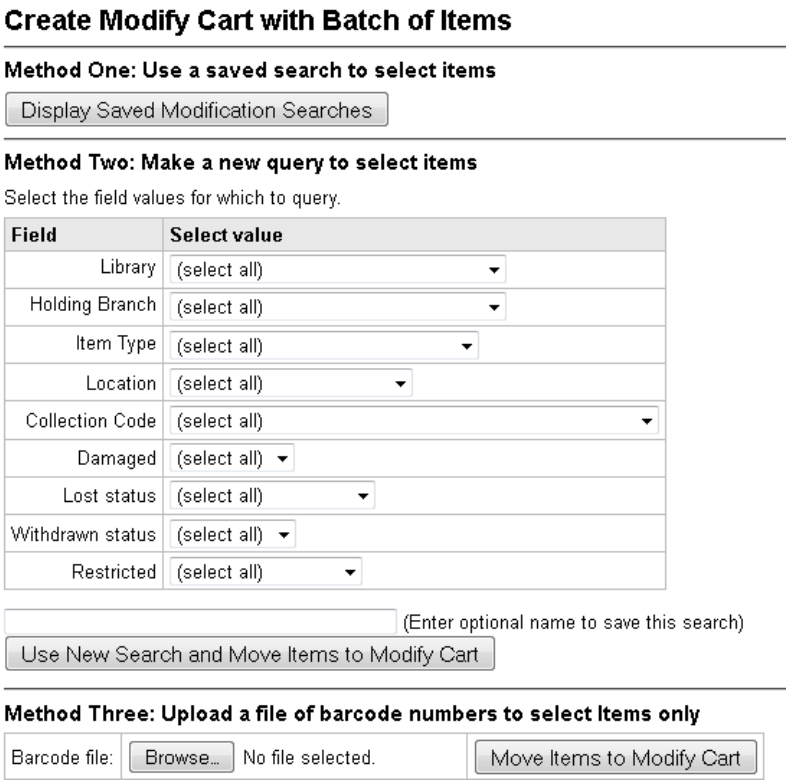
9.9.2 Batch Edit Utility

Go to Tools, Batch Edit Items and Summaries (although this feature no longer edits summary records – just items). This brings up a selection screen.


Create Modify Cart with Batch of Items
Method One: Use a saved search to select items
Display Saved Modification Searches
Method Two: Make a new query to select items
Select the field values for which to query.
Field
Select value
Library
Holding Branch
Item Type
Location
Collection Code
Damaged
Lost status
Withdrawn status
Restricted
(select all)
(Enter optional name to save this search)
Use New Search and Move Items to Modify Cart
Method Three: Upload a file of barcode numbers to select items only
Barcode file:
Browse...
No file selected.
Move Items to Modify Cart

You have the option to search for and edit all items matching specified criteria (for example, all items with a particular item type), or to upload a file of barcodes to affect only those records. If you search through this utility, you can save that search and use it again later.

9.9.2.1 Method One: Saved Search

If you have saved searches, click the Display Saved Modification Searches button. You'll be taken to a screen with a list of searches. Click on the name of a search, and the screen will expand to show the search criteria:

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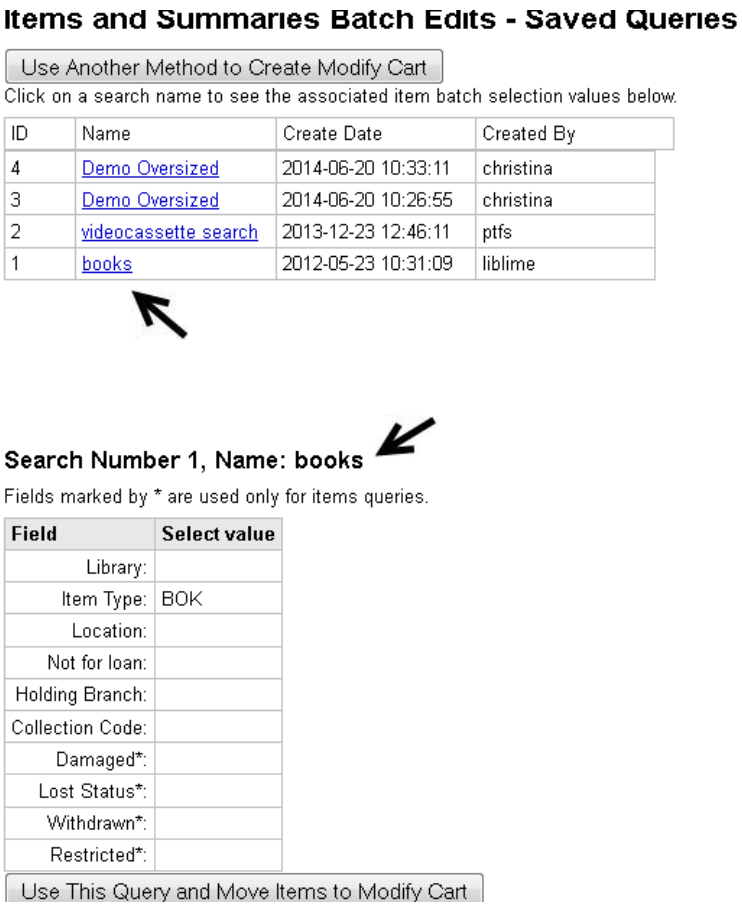

Click the bottom button to use this search.

9.9.2.2 Method Two: Search for Records

Using the drop down boxes, you can select for values within item records, search, and a group of records will be set aside for manipulation. For example, you might want to edit all records with a particular item type.

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Method Two: Make a new query to select items

Select the field values for which to query.

Field	Select value
Library	(select all)
Holding Branch	(select all)
Item Type	Book
Location	(select all)
Collection Code	(select all)
Damaged	(select all)
Lost status	(select all)
Withdrawn status	(select all)
Restricted	(select all)

(Enter optional name to save this search)

Use New Search and Move Items to Modify Cart

Click the button and you'll be taken to a summary screen. There are two parts to this screen. The top part gives a count and shows the items returned by the search.

Items Batch Edits: 472 Items

Cancel Editing this Batch of Items

Check the upper left checkbox to check/uncheck all items at once. Check a checkbox to set or unset that item number as a Checked Item for a batch operation.
Click on an item number (inum) for detailed item information.

Inum	Barcode	Call Number	Title	Author	Last Seen
20	37570000463090	Video Collection	100 years of terror		2009-05-29
21	37570000463082	Video Collection	100 years of terror		2009-05-29
90	37570000462431	Video Collection	1993 World Trade Center bombing		2009-11-17
98	37570000443985	LOST ITEM; NOT ON SHELF	2001, a space odyssey		2004-12-21
129	37570000332147	Video Collection	42nd Street		2009-05-29
145	37570000345552	Video Collection	The 54th Massachusetts		2009-05-29
194	37570000474634	Video Collection	A Tour of the Louvre		2009-11-30
446	37570000310473	Video Collection	The adventures of Huckleberry Finn		2009-05-29
505	37570000310572	Video Collection	African wildlife		2009-05-29

Select Checked Items | Delete Checked Items | Delete Checked Items and Biblios where last item deleted

Item 20 Detail: **Edit Your Checked Items Modifications:**

If you just want to delete the matching items, you would click the upper left corner checkbox to select all items, then click the appropriate delete button. Note that you can choose to delete the title record if removing the last item attached.

The lower part of the screen allows you to enter new values to edit the items. Again, first use the upper left checkbox to select all items. (You could also scroll through and check items individually.) Then at the bottom of the screen, decide what you want to change. In this example, the item type is being changed:

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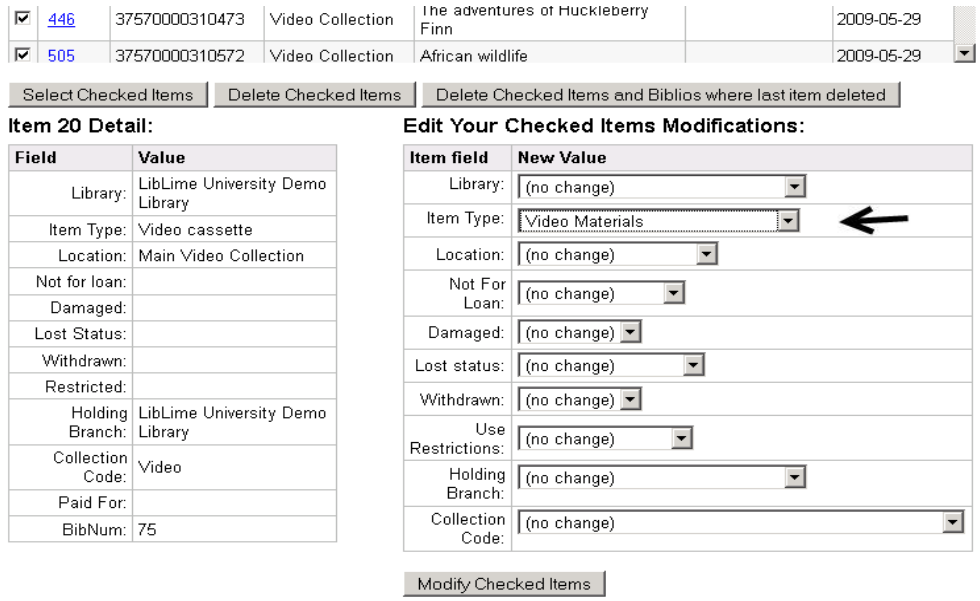
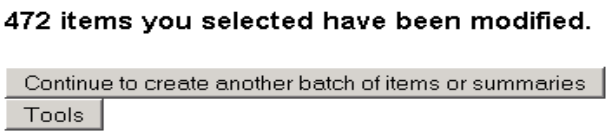


When ready, click Modify Checked Items and those records will be edited. You'll be given a summary screen with the result.



9.9.2.3 Method Three: Upload a File of Barcode Numbers

A file of barcode numbers can be uploaded; the corresponding records will be returned as a set for editing and updating. (There must be only one barcode per line in the upload file.) From the initial screen, use the Browse button to navigate to your file and select it.

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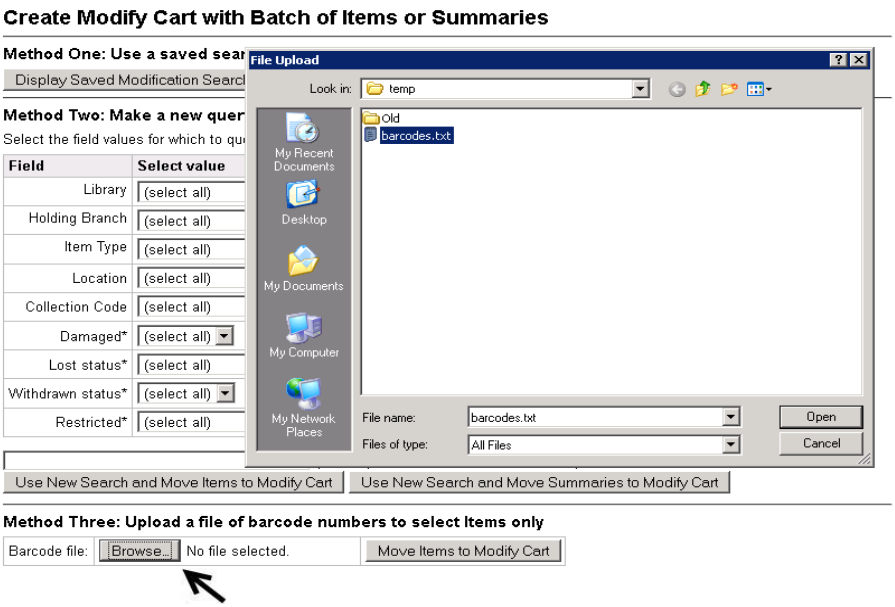
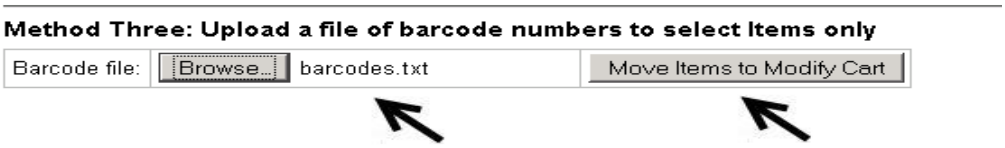
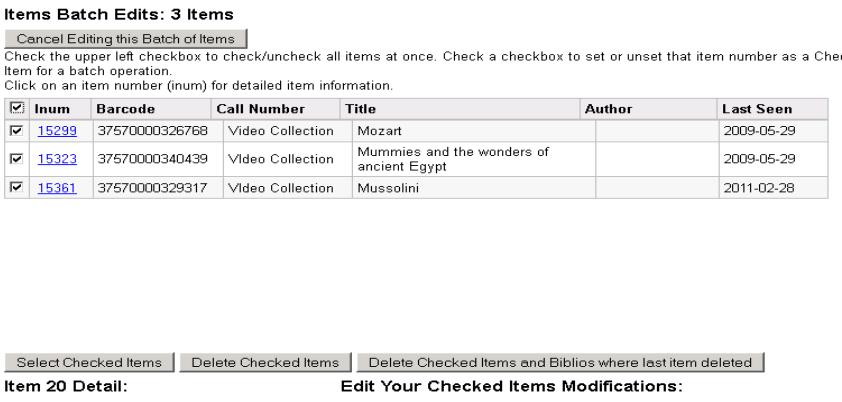


Click Open on the File Upload window. Your filename will show on the main screen. Then click the Move Items to Modify Cart button.


Method Three: Upload a file of barcode numbers to select items only
Barcode file:
Browse...
barcodes.txt
Move Items to Modify Cart

You'll see the same two-part screen as with the second (search) method. Use the checkboxes to select your items at the top:



Then either click the appropriate button to delete, or move to the bottom and make your edit selections.

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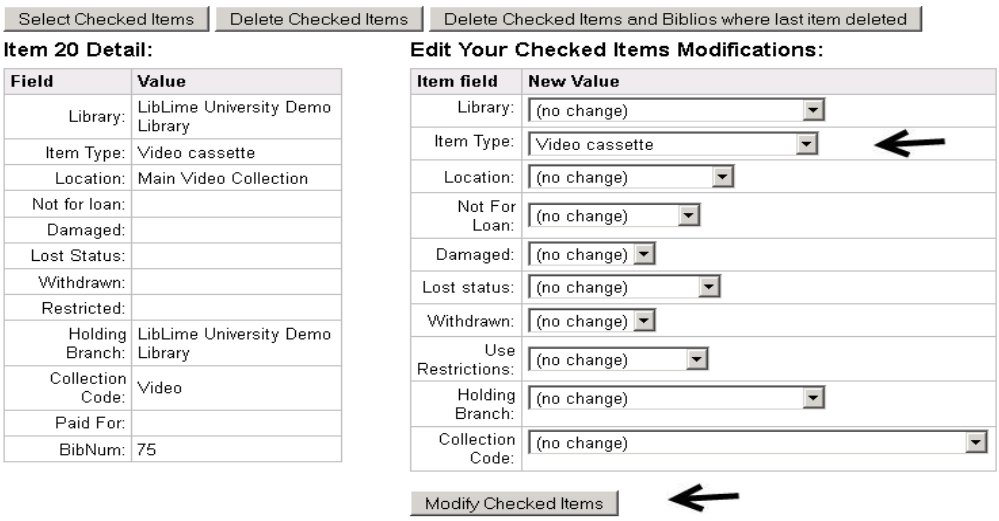

Click Modify Checked Items to edit the barcodes you uploaded.

10. Label Printing

Library staff may use third-party software for label printing, or may use the built-in DLS function.

10.1 Label Initial Setup

In order to use the Label function, it is necessary to setup three pieces of information: Profiles, Templates and Layouts. **Profiles** define printer settings. **Templates** reflect the actual size of the label and paper you will be printing. **Layouts** contain the fields of data you want to print.

10.1.1 Layouts

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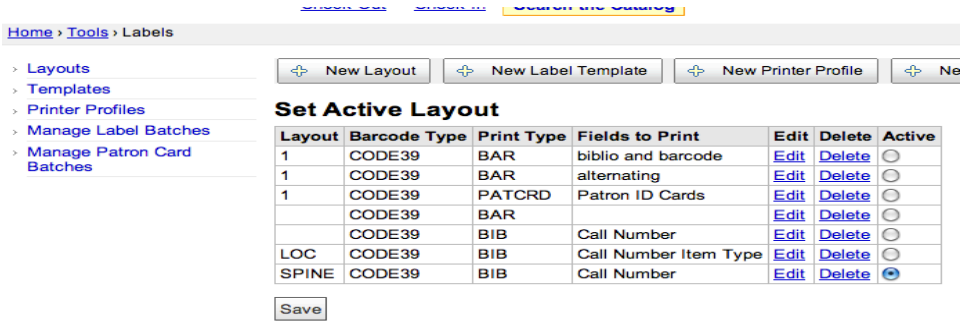
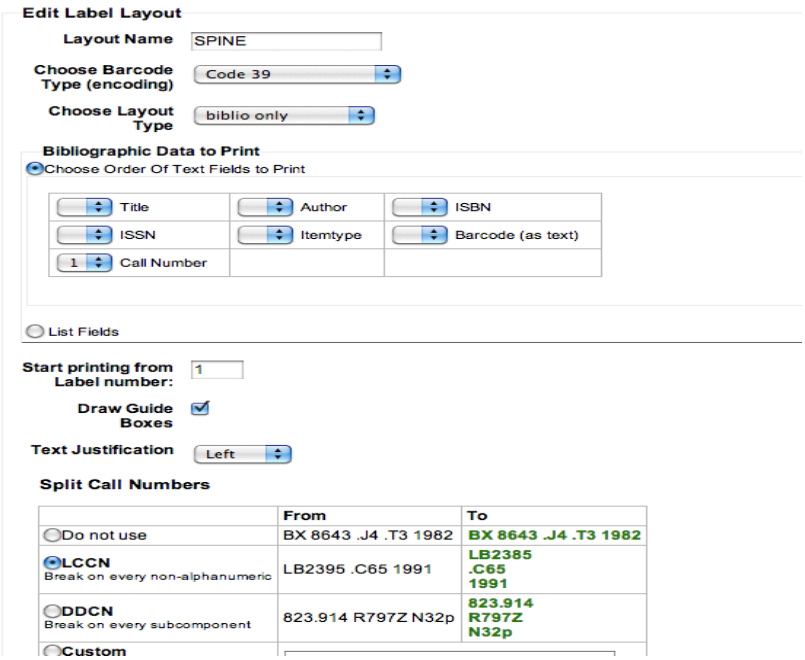
Layouts designate the fields of data to be printed. From the main staff page, go to **Tools, Label and Patron Card Creator**. The first page that comes up will be the **Set Active Layout** window as shown below (your list of Layouts may have different entries):


Home › Tools › Labels
Layouts
Templates
Printer Profiles
Manage Label Batches
Manage Patron Card Batches
New Layout
New Label Template
New Printer Profile
Set Active Layout
Layout | Barcode Type | Print Type | Fields to Print | Edit | Delete | Active
1 | CODE39 | BAR | biblio and barcode | Edit | Delete
1 | CODE39 | BAR | alternating | Edit | Delete
1 | CODE39 | PATCRD | Patron ID Cards | Edit | Delete
CODE39 | BAR | Edit | Delete
CODE39 | BIB | Call Number | Edit | Delete
LOC | CODE39 | BIB | Call Number Item Type | Edit | Delete
SPINE | CODE39 | BIB | Call Number | Edit | Delete
Save

In the example above, the "SPINE" layout shows a **Print Type** of "BIB", which indicates it will print Bibliographic data. (Compare this with the Layouts above that show print types of BAR for printing barcodes, or PATCRD for printing patron cards).

When clicking Edit on an existing Layout, or the New Layout button, you will see the **Edit Label Layout** window shown here:



In the example above, the Layout Name is "SPINE". This Layout was created to print spine labels on books. A typical spine label would display a call number. This layout has a **Barcode** Type of Code 39. **Barcode Type** should always be set to Code 39. The **Layout Type** is set to

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"biblio only" because the call number of a book is bibliographic in nature, i.e. "biblio" data. Other choices are:

- **barcode only** (for printing barcodes)
- **biblio only** (for printing bibliographic data such as call number, MARC fields like 250, 035, etc.)
- **barcode/biblio** (for printing both the barcode and bibliographic data, with barcode being printed first)
- **biblio/barcode** (for printing both the bibliographic data and barcode, with bibliographic data being printed first)
- **alternating labels** (not in use)
- **csv output** (not in use)
- **patron cards** (for printing patron/user cards)

If the **Layout** Type is bibliographic in nature, the Bibliographic **Data to Print** section is relevant. In this case, "Call Number" is selected with the number 1 as being the first and only field of data to print. If other fields are desired, click the up/down arrow next to the chosen field and chosen a numerical order in which to print it.

In the **Typo** example below, the **Layout Type** choice of biblio/barcode will print the bibliographic data and then the physical barcode. The **Bibliographic Data to Print** has listed data fields to print. Note these fields must be existing MARC data fields and must be entered in quotes, e.g., '099a'. If the field should have a label, it is necessary to enter the label within the quotes as well, e.g., 'System ID:035a'. Make sure you use single quotes, and separate field entries with a comma.

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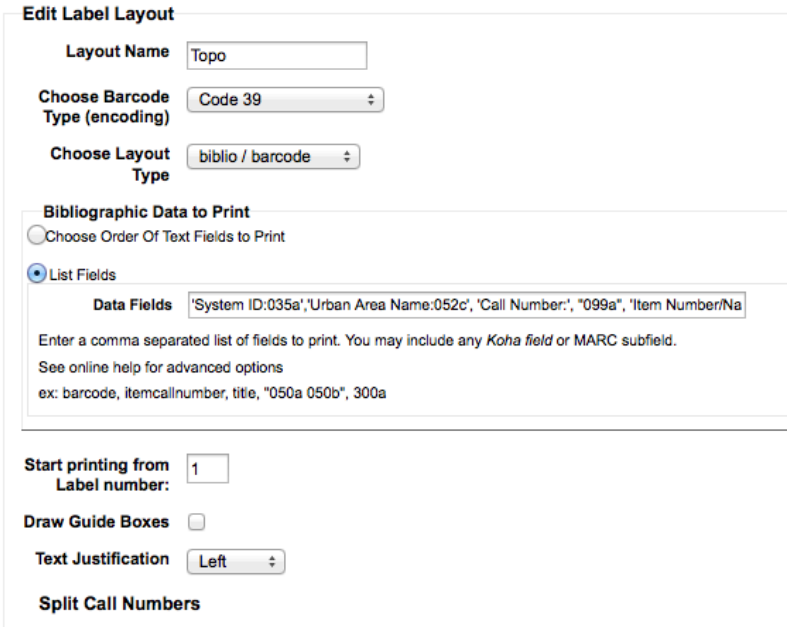
Edit Label Layout
Layout Name
Topo
Choose Barcode Type (encoding)
Code 39
Choose Layout Type
biblio / barcode
Bibliographic Data to Print
Choose Order Of Text Fields to Print
List Fields
Data Fields
'System ID:035a','Urban Area Name:052c', 'Call Number:', "099a", 'Item Number/Na
Enter a comma separated list of fields to print. You may include any Koha field or MARC subfield.
See online help for advanced options
ex: barcode, itemcallnumber, title, "050a 050b", 300a
Start printing from Label number:
1
Draw Guide Boxes
Text Justification
Left
Split Call Numbers

The **Start printing from Label number** box is typically set to 1 to begin printing with the first label in a set.

Draw Guide Boxes can be selected to give an indication of how the labels will line up on a sheet of label stock when printed. It is recommended to select this box and conduct a trial run of printing. Once the trial is complete and labels are successfully setup, the box should be de-selected.

Text Justification can be set to Left, Center or Right.

Split Call Numbers will depend on the type of label to be printed. Typically spine labels would be split using the LCCN or DDCN splitting routine. Your library may choose "Do not use" if the data is to be printed horizontally, as shown below:

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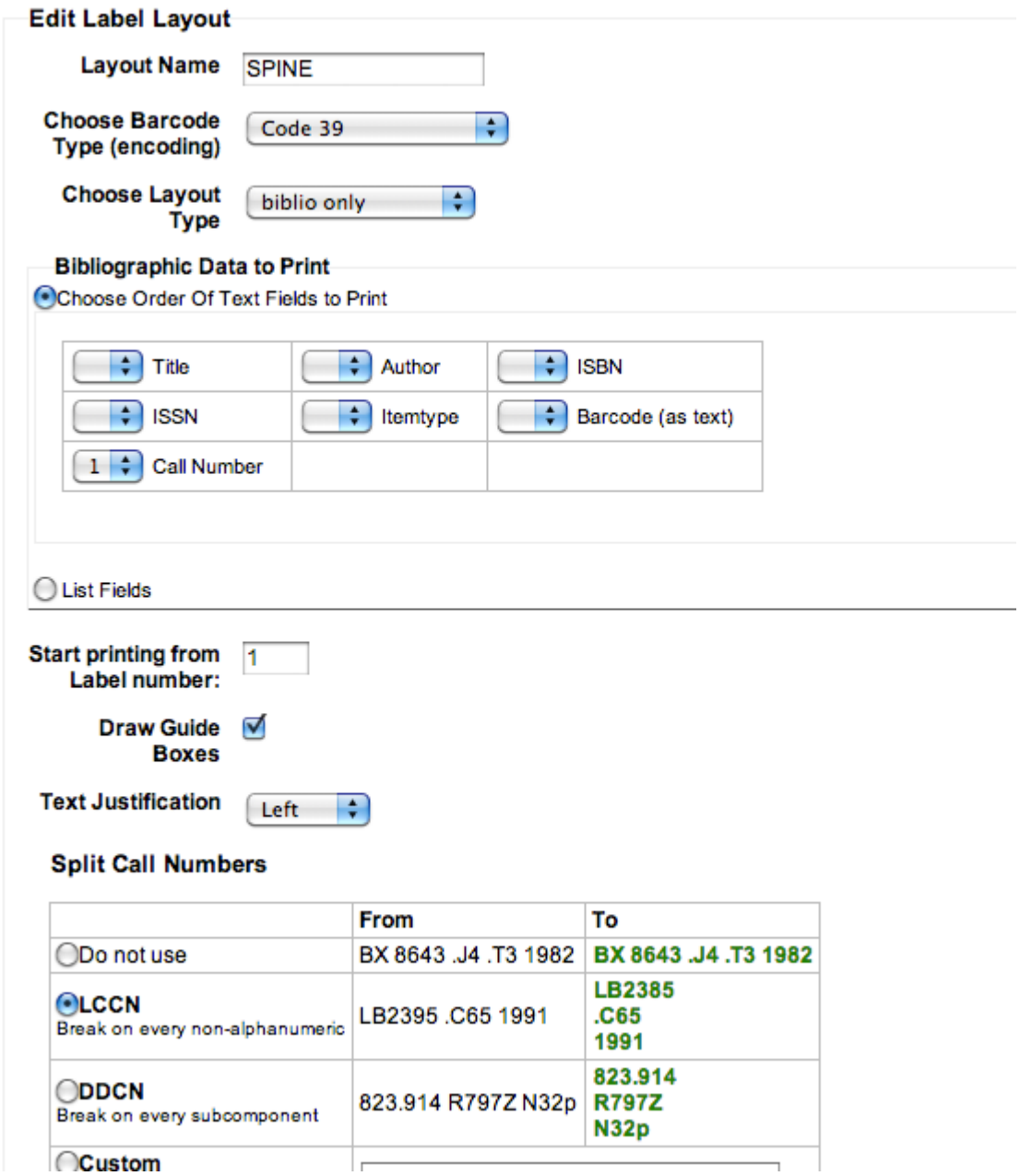

*TIP: When creating a new Layout and multiple staff (or libraries) will be using the Label interface, it is a good idea to give each layout a unique name, even when using the same types of labels. For example: MJSPINE for "Mary Jane's spine layout".

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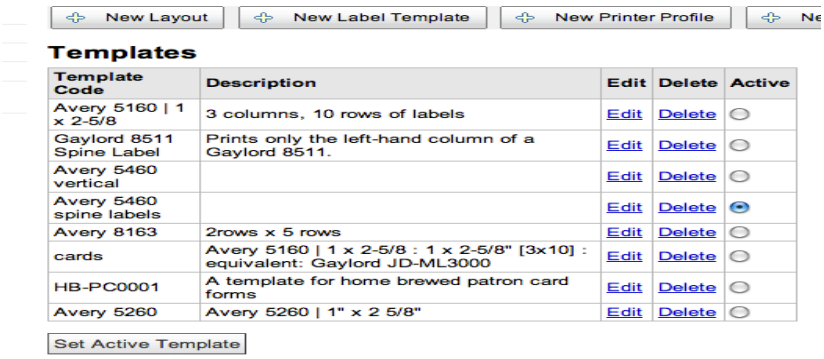
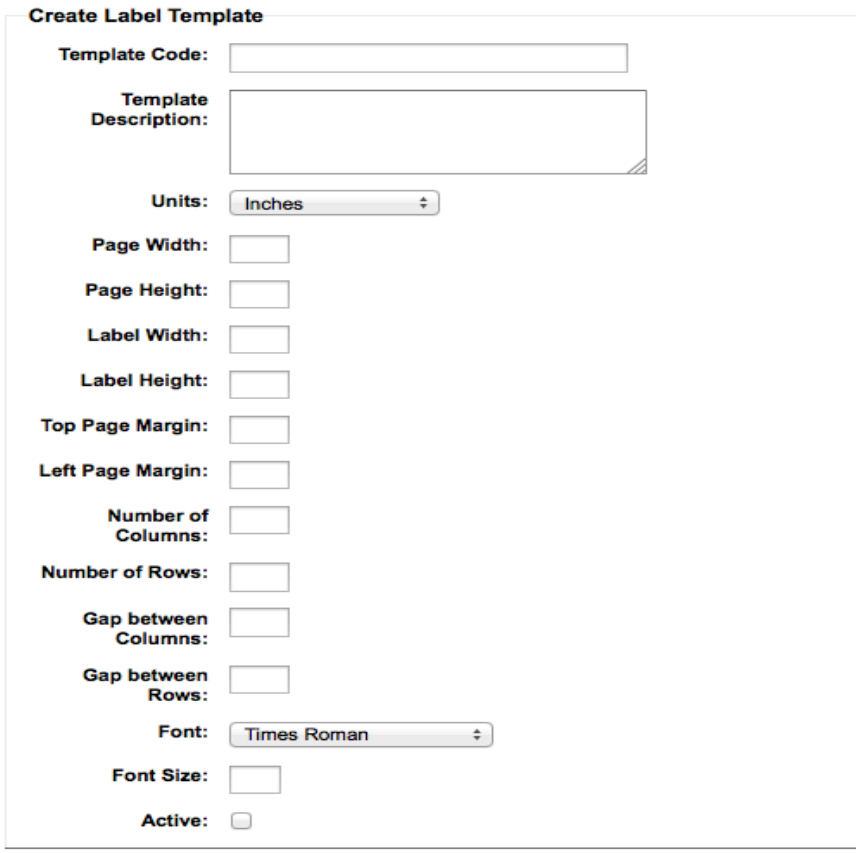
10.1.2 Templates

Templates define the paper and dimensions of the label stock:



Create a New Template or **Edit** an existing one to match the label stock you will be using. It will be helpful to have a ruler and the actual label stock in front of you. Note the forms will look different, depending on whether you are creating a NEW template or editing an existing one. The new template form displays as below:



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Assign a **Template** Code and complete the fields to match your label stock. Pay particular attention to the Label Width and Label Height. **Units** allow the choice of Inches, Centimeters, Millimeters or Postscript Points. (TIP: Some libraries find more success wuing Millimeters or Centimeters.)

The **Edit Template** displays as shown below:

Edit Label Template
Template ID: 3
Template Code: Avery 5460 vertical
Template Description: Default description
Units: US Inches
Page Height: 5.625 in
Page Width: 3.625 in
Label Width: 1.5 in
Label Height: 0.75 in
Top Page Margin: 2 in
Left Page Margin: 7 in
Top Text Margin: 0.38 in
Left Text Margin: 0.35 in
Number of Columns: 2
Number of Rows: 1
Gap between Columns: 0.25 in
Gap between Rows: 0 in
Profile: default/default

*TIP: When multiple staff (or libraries) will be using the Label interface, it is a good idea to give each template a unique name, even when using the same types of labels. For example: MIDAVERY5460 for Midtown Branch Avery 5460 labels.

10.1.3 Profiles

The **Profile** names the specific printer to be used in printing of labels. The profile can be named whatever you like – the actual name of the printer, or a generic "default". Each library should have its own Profile defined.

NOTE: Profile is not required; however, some libraries experience printer "creep" during large batch printing. In these cases, editing the Printer Profile can prove helpful.

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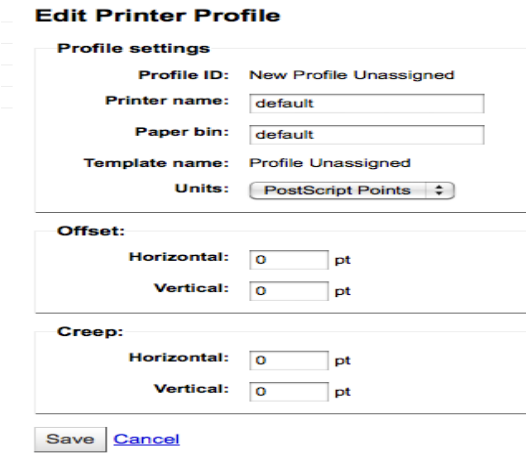
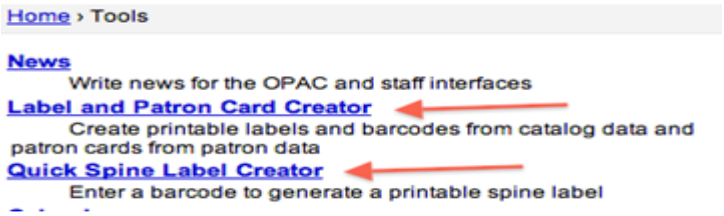


10.2 Generating Labels

Labels can be printed individually or in batch mode. Both options are available under Tools, Label Creator:


Home › Tools
News
Write news for the OPAC and staff interfaces
Label and Patron Card Creator
Create printable labels and barcodes from catalog data and patron cards from patron data
Quick Spine Label Creator
Enter a barcode to generate a printable spine label

The **Quick Spine Label Creator** allows entry of a barcode to generate one label, based on configuration from system preferences.

The **Label and Patron Card Creator** allows creation of batches to be printed in a group, such as all the items cataloged on a particular day.

Click the **New Label Batch** button to create a batch:

Click the **Add item(s) to Batch** button to add items to your batch:

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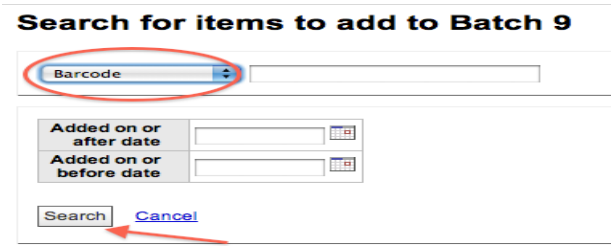
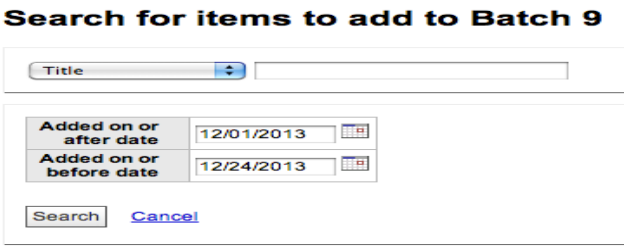
If your materials are already barcoded, choose **Barcode** from the pull-down menu on the **Search** window:



and scan each barcode you want to add to the batch.

Alternatively, date ranges can be used to find all items cataloged during a specified period:



Other search options include Title, Author, Publication Date, etc. as shown below:

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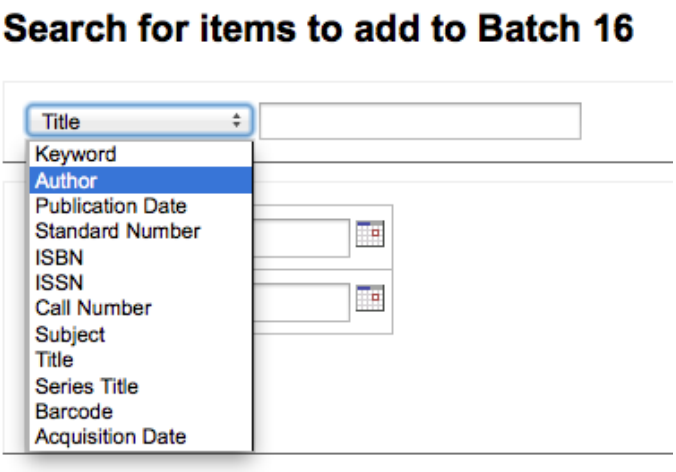
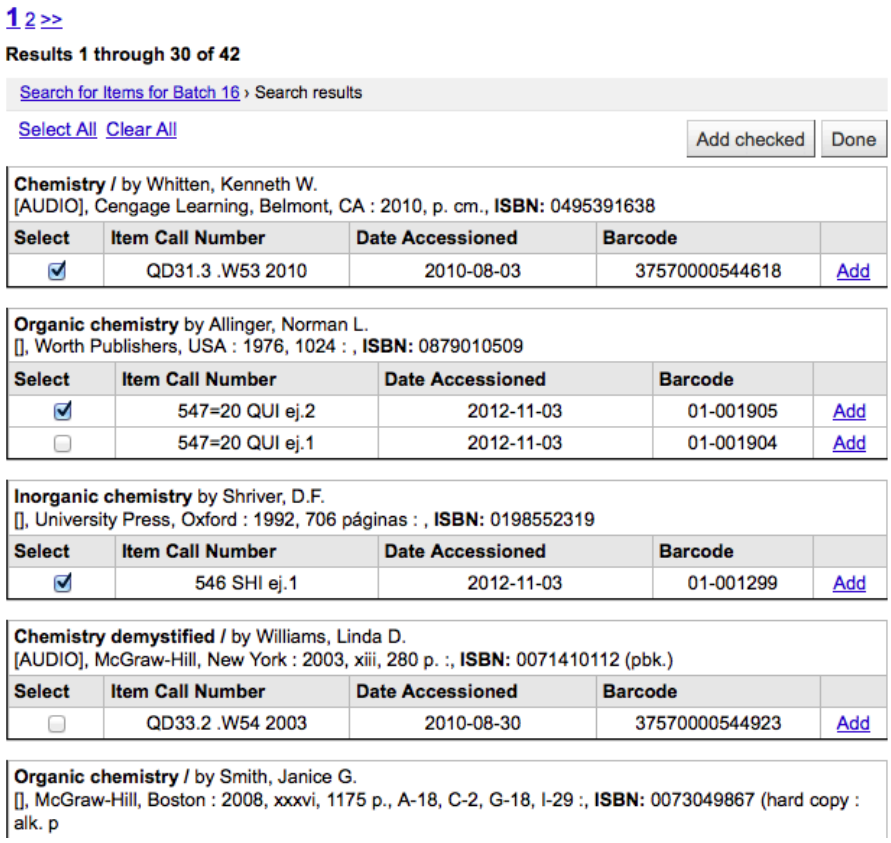


After retrieving a set of results, manually click each item from your results, or click the **Select All** option to select items to add to your batch. Then click **Add Checked** and **Done** buttons to close the search window:


1 2 >>
Results 1 through 30 of 42
Search for Items for Batch 16 › Search results
Select All Clear All
Add checked
Done
Chemistry / by Whitten, Kenneth W.
[AUDIO], Cengage Learning, Belmont, CA : 2010, p. cm., ISBN: 0495391638
Select | Item Call Number | Date Accessioned | Barcode
QD31.3 .W53 2010 | 2010-08-03 | 37570000544618 | Add
Organic chemistry by Allinger, Norman L.
[], Worth Publishers, USA : 1976, 1024 : , ISBN: 0879010509
Select | Item Call Number | Date Accessioned | Barcode
547=20 QUI ej.2 | 2012-11-03 | 01-001905 | Add
547=20 QUI ej.1 | 2012-11-03 | 01-001904 | Add
Inorganic chemistry by Shriver, D.F.
[], University Press, Oxford : 1992, 706 páginas : , ISBN: 0198552319
Select | Item Call Number | Date Accessioned | Barcode
546 SHI ej.1 | 2012-11-03 | 01-001299 | Add
Chemistry demystified / by Williams, Linda D.
[AUDIO], McGraw-Hill, New York : 2003, xiii, 280 p. :, ISBN: 0071410112 (pbk.)
Select | Item Call Number | Date Accessioned | Barcode
QD33.2 .W54 2003 | 2010-08-30 | 37570000544923 | Add
Organic chemistry / by Smith, Janice G.
[], McGraw-Hill, Boston : 2008, xxxvi, 1175 p., A-18, C-2, G-18, I-29 :, ISBN: 0073049867 (hard copy : alk. p

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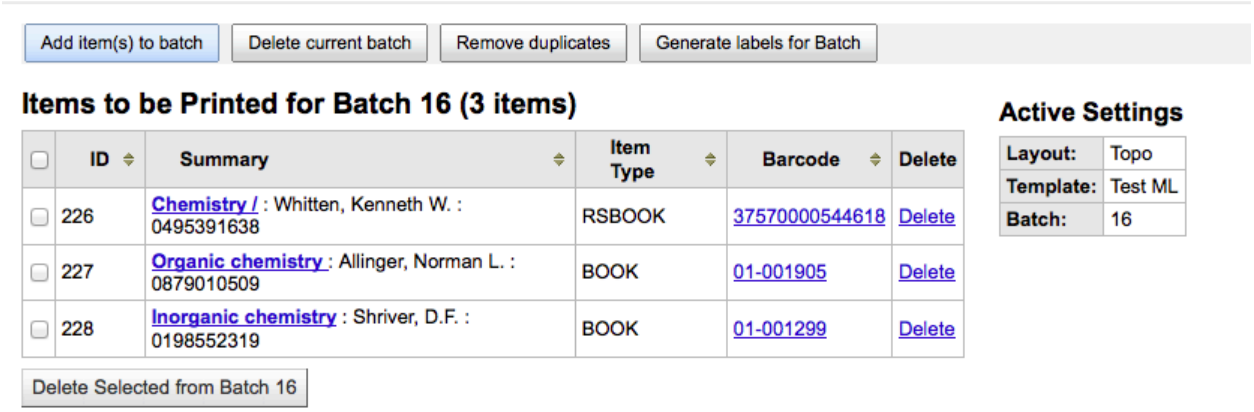
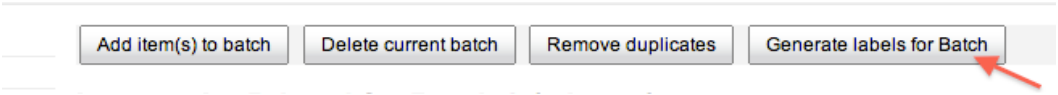
Your batch should appear similar to the one below:

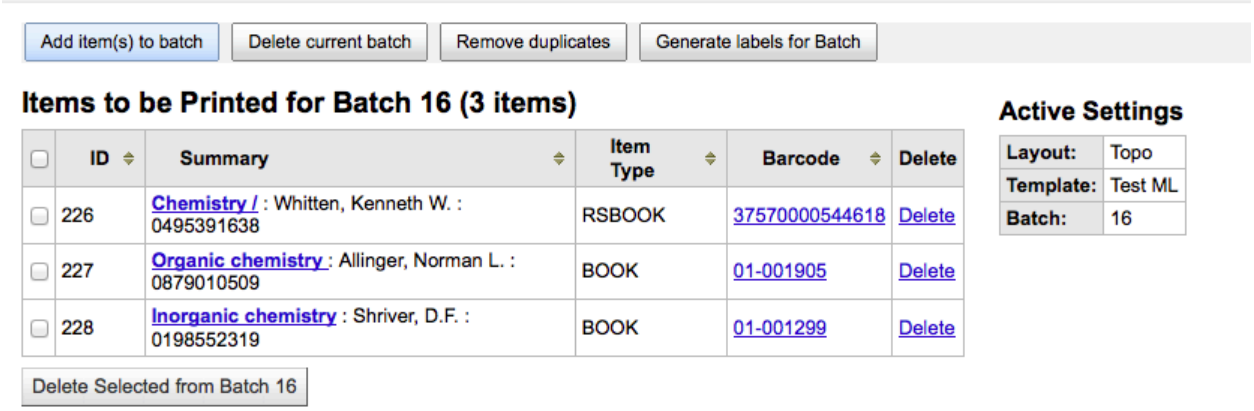


10.3 Label Printing

Click the **Generate Labels for Batch** button to print your batch:



The system will print the labels in a format that is specified as Active in the **Layout** and **Template** settings. You can see the **Active Settings** on the right of the **Items to be Printed for Batch** results:



If you need to change the **Active Settings**, click **Templates** or **Layouts** and set Active Template or Layout.

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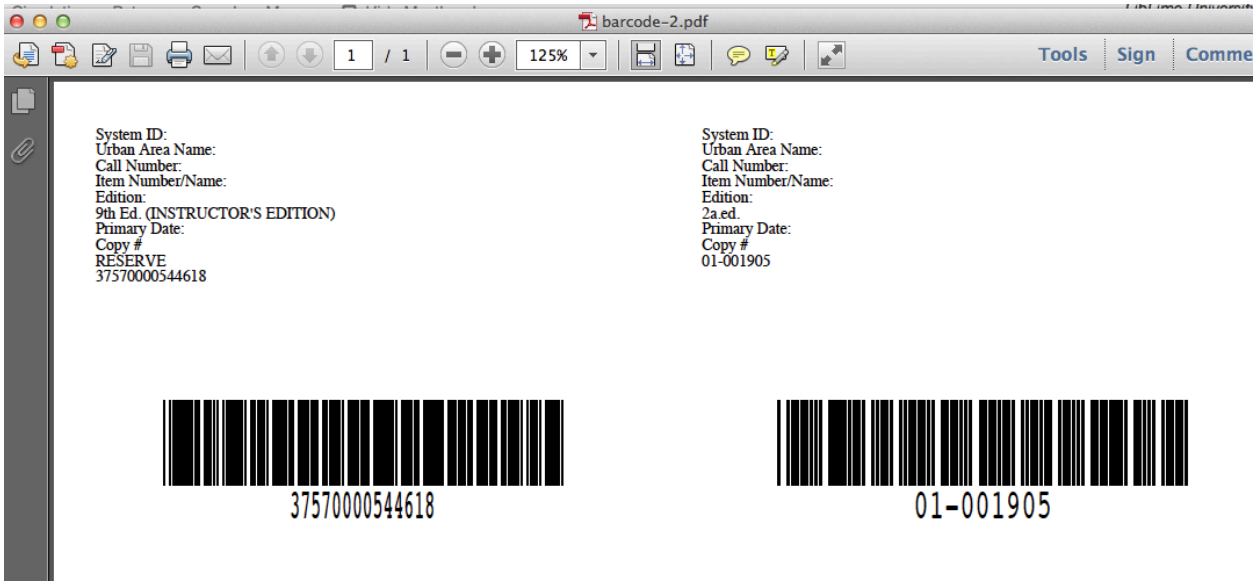
When the **Generate labels for Batch** button is clicked, the system will export as a .pdf file, which can then be printed from a printer of your choice. Examples of .pdfs displaying on screen are shown below:

F 319 .M6 T48 2003	TD348	U 22.3 .G76 1996
QA 76.7 .S67	PZ 8 .B276	



11. Exporting Bibs and Items

Staff with permissions can export some or all bibliographic records. (For large catalogs, this may need to be done in groups to avoid browser timeout.) Under Tools, select Export Bibliographic and Holdings.

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On the setup screen, you can limit your export by biblionumber or range, import batch number, the results of a saved search, branch, item type, call number range, accession date. You can also choose not to export item records or certain fields. Your file format options are MARC or XML. Make your selections and click Export, then save the output file to your computer.

For example, to export from a saved search:

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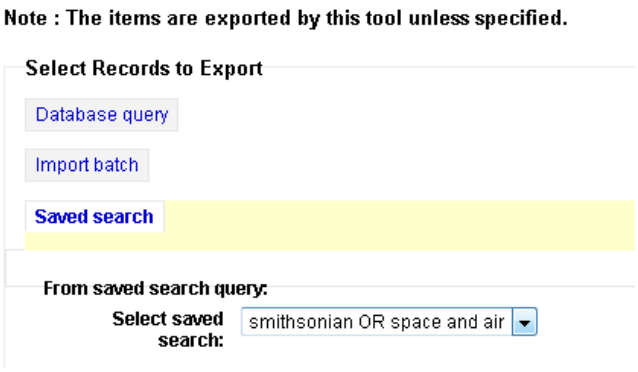
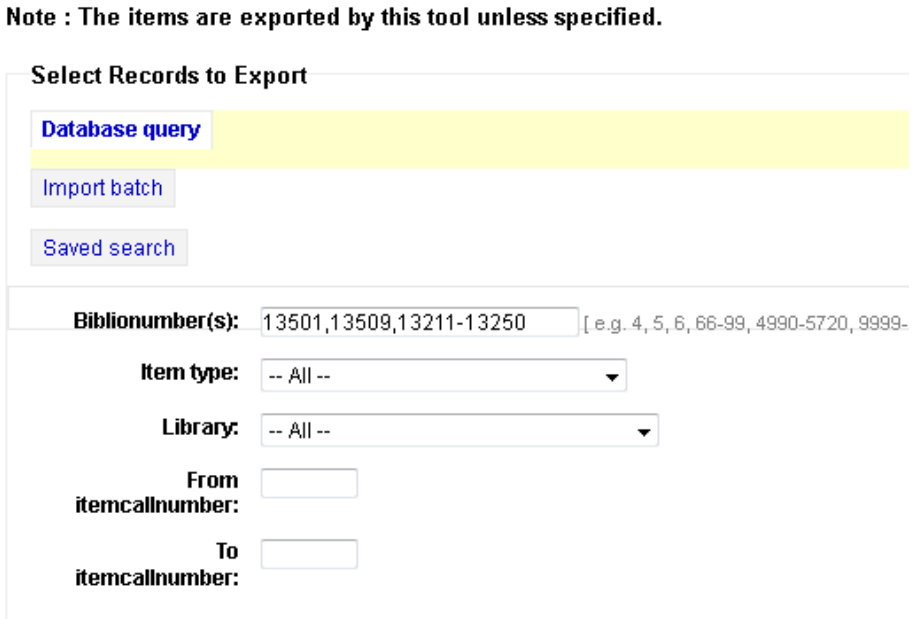

Note : The items are exported by this tool unless specified.
Select Records to Export
Database query
Import batch
Saved search
From saved search query:
Select saved search:
smithsonian OR space and air

From a batch import:

Note : The items are exported by this tool unless specified.
Select Records to Export
Database query
Import batch
Saved search
From import batch:
Export the catalog records of a committed import batch
Import Batch ID:
1366

From multiple specified biblionumbers:



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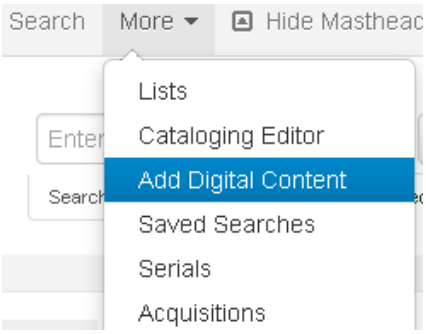
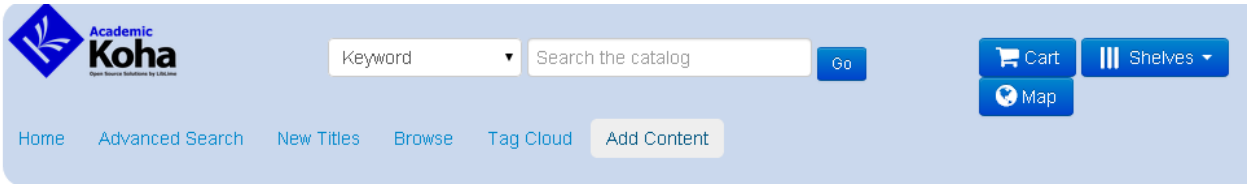
12. Digital Object Handling (DLS Systems Only)

For sites using the full DLS system, digital objects can be uploaded as well as MARC records. In staff mode, digital objects are uploaded through More, Add Digital Content:



You can also allow your users to upload digital objects from the Discovery Layer. The easiest way is to assign the DLSO permissions to the Role record associated with that patron category (see the Roles and Granular Permissions sections above). Then, in the Discovery Layer, to add a digital object, click on Add Content from the masthead.



Either the staff or patron load opens a screen with options:

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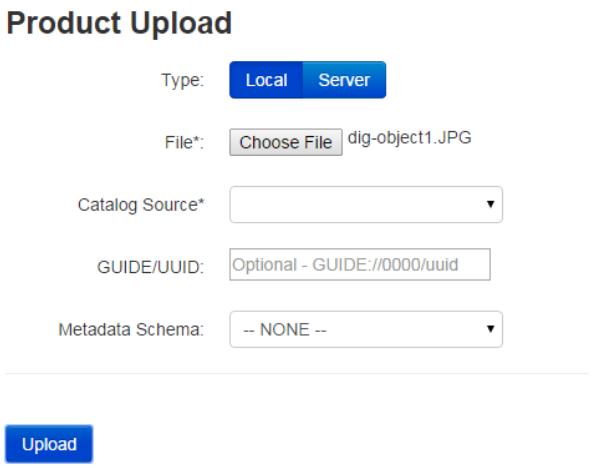
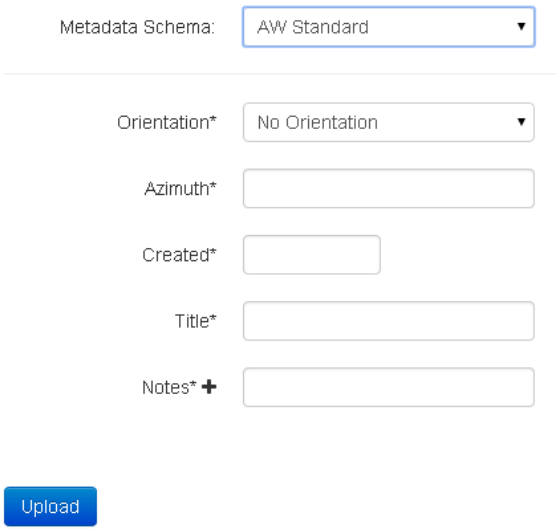


If your site is using cataloging access control, the user must select a cataloging source from the pulldown. The user will only see entries for which he has permission (see the section on granular permissions earlier in the User Manual). If access control is not being used, that field will not show.

Use the Choose File option to navigate to the object file. If your site uses the catalog source access control feature, select the collection from that pulldown. You will only see the collections for which you have permissions. If desired (this can be site-specific), choose the desired Metadata Schema from the list provided in the drop down menu. If you choose a Metadata Scheme, fill out additional information required:



For Notes, you can add more than one entry; click the + sign to display an additional data entry field.

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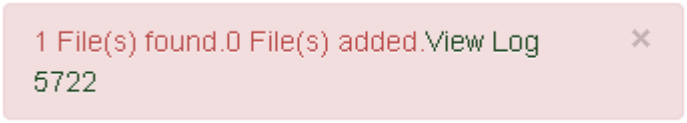
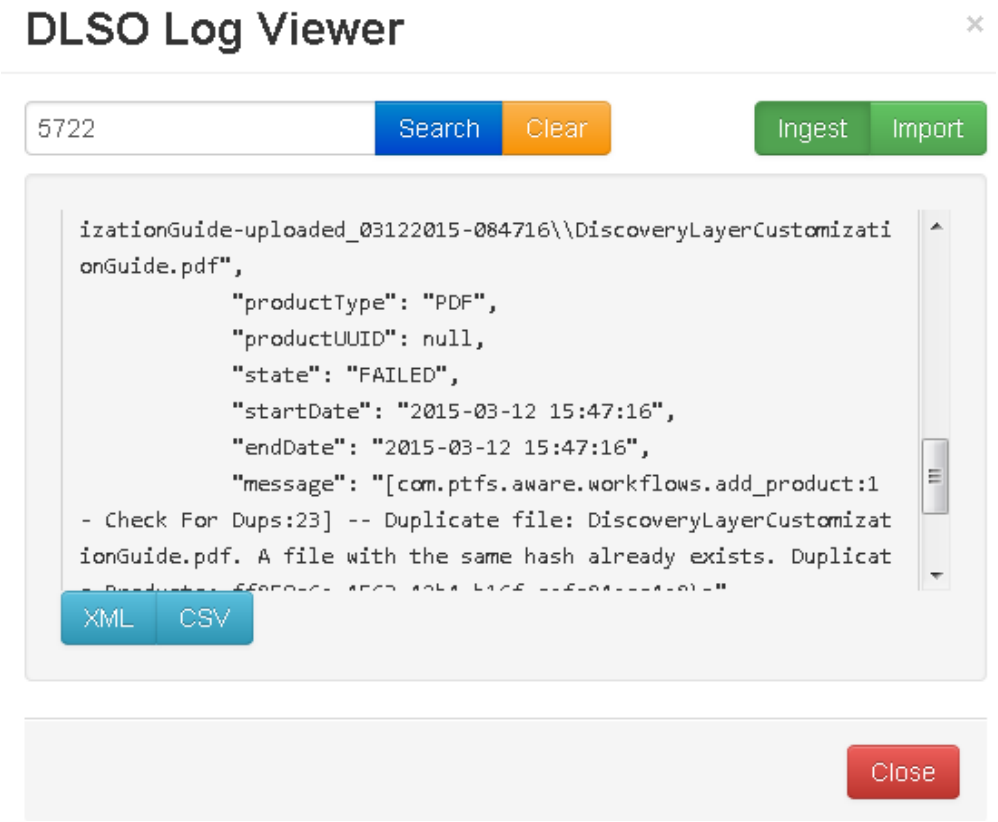
When you have finished, click the Upload button. You will ordinarily see a success popup; if there is a problem the popup will indicate that no file was uploaded:



You can click on the View Log link in the popup to check the problem:



The log is also available through Tools, DLSO Log Viewer; you will need the log number of your upload. This is added as a note in the staged record entry, such as “DLSO ingest batch log ID 5721.”

Patrons may be permitted to upload digital objects, but only library staff users can complete the import. The digital object is visible and manageable from the Manage Staged MARC Records area (under Tools) and can be imported into the system from there.

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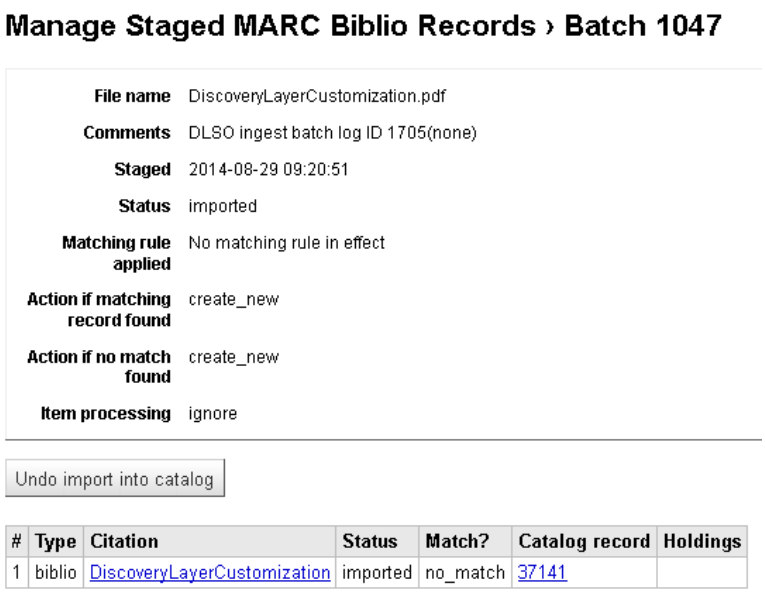
1050	0_1_.jpg	DLSO ingest batch log ID 1900	staged	2014-08-29 15:10:02	1	0	Clean
1049	Media.zip	DLSO ingest batch log ID 1853	imported	2014-08-29 14:42:27	2	0	Clean
1048	Office.zip	DLSO ingest batch log ID 1852	imported	2014-08-29 14:37:49	15	0	Clean
1047	DiscoveryLayerCustomization.pdf	DLSO ingest batch log ID 1705	imported	2014-08-29 09:20:51	1	0	Clean
1046	marionette-gentle-introduction-sample_1_.pdf	DLSO ingest batch log ID 1704	imported	2014-08-28 10:45:19	1	0	Clean

Click on the batch/filename to open the batch. You can then complete the import:


Manage Staged MARC Biblio Records › Batch 1047
File name DiscoveryLayerCustomization.pdf
Comments DLSO ingest batch log ID 1705(none)
Staged 2014-08-29 09:20:51
Status imported
Matching rule applied No matching rule in effect
Action if matching record found create_new
Action if no match found create_new
Item processing ignore
Undo import into catalog
Type Citation Status Match? Catalog record Holdings
1 biblio DiscoveryLayerCustomization imported no_match 37141

The system will load the object and will create a minimal MARC record with the title being the object's filename. Staff can then edit that record to something more appropriate.

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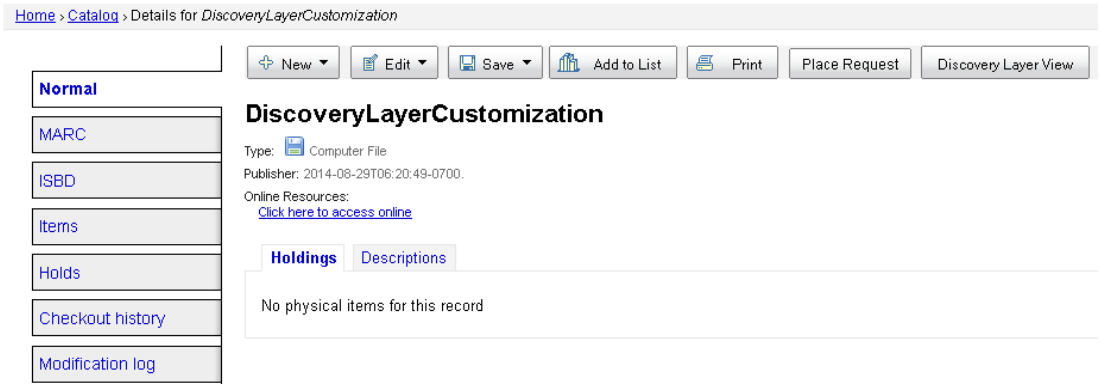
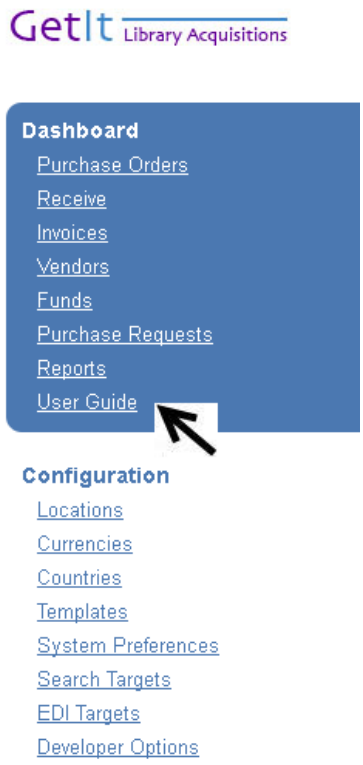


13. Acquisitions

A complete acquisitions User Guide is available as a link from within the acquisitions program; refer to that manual for more information on any section.



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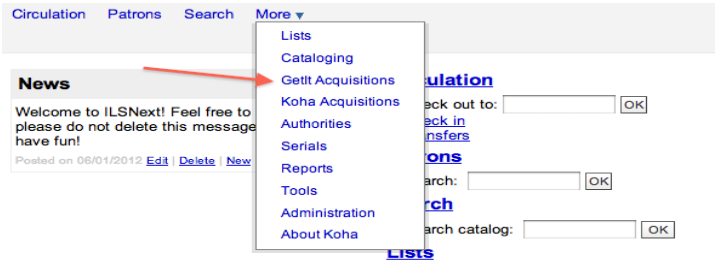
To use Acquisitions, select the **More** pull-down menu on the main screen and then select **GetIt Acquisitions** (or simply click **Acquisitions** on the main menu):



Any material that a vendor offers for sale can be ordered through Acquisitions. Each order created will consist of a Purchase Order and one or more Purchase Order Lines with one or more Copies.

Purchase Orders (also called POs) record the Vendor Account and Purchase Order Number, as well as optionally the Order Type.

Purchase Order Lines (also called POLs) store the Bibliographic Record data associated with a title you are ordering.

Copies store the Location information and are used to **Receive** the material as well as to create an Item record in the DLS.

13.1 Setting up Acquisitions

Under Home, Administration, Global System Preferences, Acquisitions, the GetItAcquisitions syspref must be turned on. Permissions to acquisitions are set according to the user's Role or individual staff permissions. See that section of the DLS User Manual for more information on creating Patrons and assigning Roles. The rest of the configuration is done within the Acquisitions module itself; go into Acquisitions and use the menu links there.

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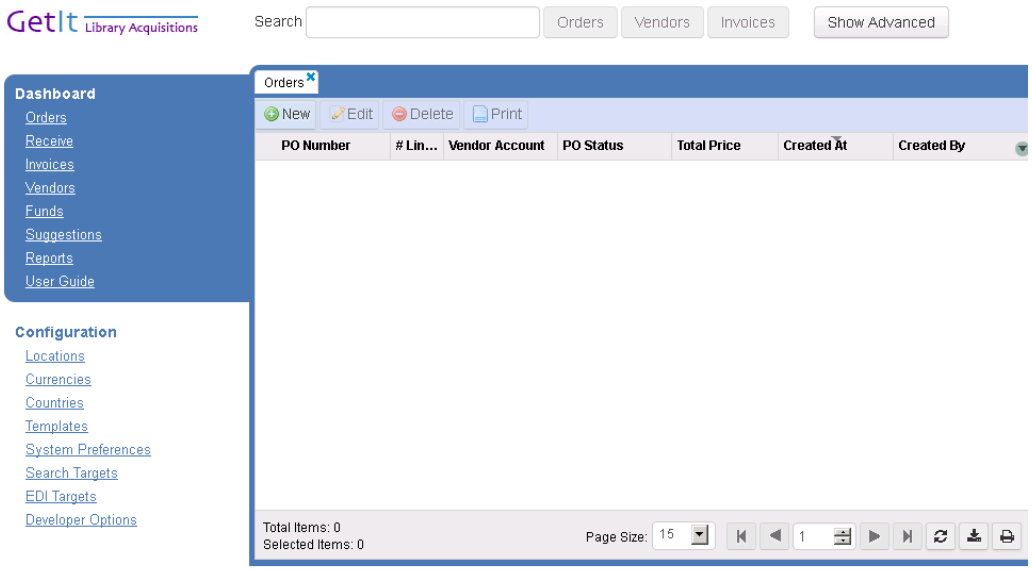
Before staff can use the acquisitions module, you will need to configure vendors and funds. Go to Acquisitions, and use the Vendors and Funds link in the left sidebar menu. You should also work through the options under the Configuration section of the sidebar menu.



13.2 Setting up Vendors

Before creating Purchase Orders for the first time, it is necessary to set up **Vendors** and **Funds**. A **Vendor** is a top-level parent record that contains one or more Vendor Accounts. A Vendor Account represents a business relationship between your organization and a vendor. Each Vendor Account has one or more Addresses. Each Address can be assigned one or more Address Uses, such as Order, Payment, Returns, Claims, or All. The Address Uses specify when in the ordering cycle the system will assign the Address.

You can set up more than one Vendor Account per Vendor. This allows you to assign different Account Numbers, Discounts, Order Types and Addresses depending on the Vendor Account. It also helps you organize your business relationships with a single Vendor so you can view all Accounts with a given Vendor at once.

The vendor link is found on the left side of the Acquisitions Dashboard:

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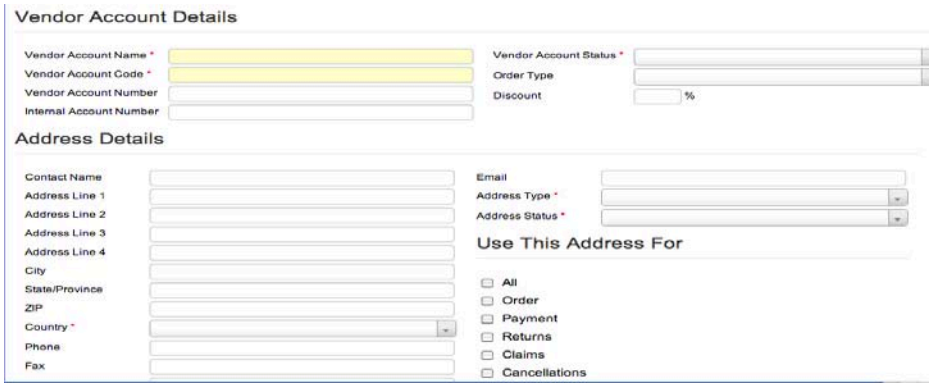
To save time, you can enter a new Vendor, Vendor Account and Address with associated uses via a single form. As a result, the form has three distinct sections: Vendor Details, Vendor Account Details, and Vendor Addresses:



13.2.1 Vendor Account Details

The **Vendor Account Name** (mandatory) is the account name your Vendor uses for your orders. The account name can identify accounts for standing orders, personal orders, media, books, or others. When you create a Purchase Order, the Vendor Account Name is the first piece of information the system requires. When you name your accounts, be sure to make them as unique as possible. Examples: B&T Continuations; YBP Approval Plan; ALA Blanket order, etc.

The **Vendor Account Code** (mandatory) can be used to quickly find a vendor record when creating a new order.

The **Vendor Account Number** is usually assigned by the vendor.

The **Internal Account Number** is the designation for this Vendor Account used in your local accounting system. If you have a contracted discount associated with this Vendor Account, place the Discount percentage in this field.

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13.2.2 Vendor Account Status (mandatory)

Address Details:

Country (mandatory).

Address Type (mandatory).

Address Status (mandatory).

13.3 Setting up Funds

Funds provide the acquisitions operator with views into how money has been allocated, encumbered and expended, as well as what the free and case balances are within a single Ledger.

Before ordering can take place, you need to create your funds hierarchy and allocate dollar amounts to each fund.

NOTE: Before you can begin creating your fund hierarchy, you will first need to create a **Fiscal Period** and at least one **Ledger**. You must also have your **Default Ledger**.

Once a Fiscal Period and Ledger have been created, the next step is setting up your Funds hierarchy. There are three fund types:

Summary Funds, identified by the icon, summarize the balances of all Controlling funds lower in the hierarchy. It is recommended that you only have one top-level root Summary Fund, though you may have as many subsidiary Summary Funds within that root node as you need.

Controlling Funds, identified by the icon, reflect actual appropriations. The encumbered, expended and available balances of a Controlling fund will be calculated using all transactions that use a Controlling fund or any Reporting funds lower in the hierarchy.

Reporting Funds, identified by the icon reflect the available balance of the parent controlling fund. The encumbered and expended balances will reflect the specific reporting fund.

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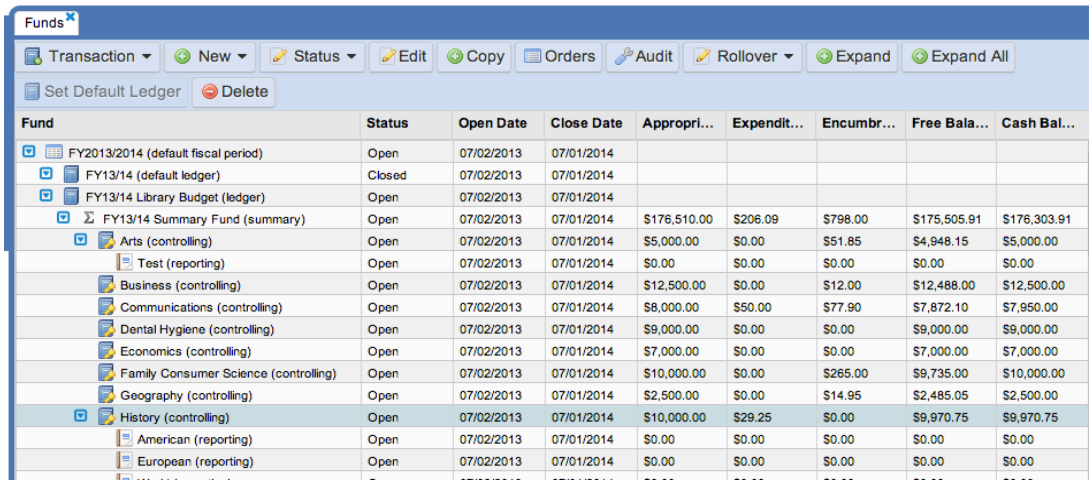
Reporting funds and Controlling Funds can be used when Funding a Purchase Order Line Copy or a Purchase Order Charge.

After you have created your **Funds** hierarchy, you can allocate money to each Controlling fund by using a Fund Transaction. Fund Transactions also may also adjust fund balances or transfer funds between **Controlling** funds. Following the general accepted accounting rules, transactions can only be added, not deleted or edited.

Here is a sample fund hierarchy that has all three fund types:



Fund	Status	Open Date	Close Date	Appropri...	Expendit...	Encumbr...	Free Bala...	Cash Bal...
FY2013/2014 (default fiscal period)	Open	07/02/2013	07/01/2014					
FY13/14 (default ledger)	Closed	07/02/2013	07/01/2014					
FY13/14 Library Budget (ledger)	Open	07/02/2013	07/01/2014					
Σ FY13/14 Summary Fund (summary)	Open	07/02/2013	07/01/2014	$176,510.00	$206.09	$798.00	$175,505.91	$176,303.91
Arts (controlling)	Open	07/02/2013	07/01/2014	$5,000.00	$0.00	$51.85	$4,948.15	$5,000.00
Test (reporting)	Open	07/02/2013	07/01/2014	$0.00	$0.00	$0.00	$0.00	$0.00
Business (controlling)	Open	07/02/2013	07/01/2014	$12,500.00	$0.00	$12.00	$12,488.00	$12,500.00
Communications (controlling)	Open	07/02/2013	07/01/2014	$8,000.00	$50.00	$77.90	$7,872.10	$7,950.00
Dental Hygiene (controlling)	Open	07/02/2013	07/01/2014	$9,000.00	$0.00	$0.00	$9,000.00	$9,000.00
Economics (controlling)	Open	07/02/2013	07/01/2014	$7,000.00	$0.00	$0.00	$7,000.00	$7,000.00
Family Consumer Science (controlling)	Open	07/02/2013	07/01/2014	$10,000.00	$0.00	$265.00	$9,735.00	$10,000.00
Geography (controlling)	Open	07/02/2013	07/01/2014	$2,500.00	$0.00	$14.95	$2,485.05	$2,500.00
History (controlling)	Open	07/02/2013	07/01/2014	$10,000.00	$29.25	$0.00	$9,970.75	$9,970.75
American (reporting)	Open	07/02/2013	07/01/2014	$0.00	$0.00	$0.00	$0.00	$0.00
European (reporting)	Open	07/02/2013	07/01/2014	$0.00	$0.00	$0.00	$0.00	$0.00

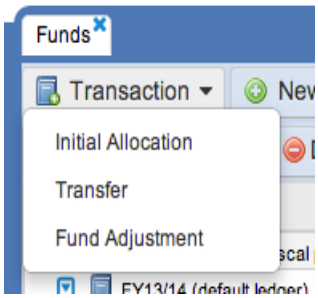
There are three types of transactions that can be used to directly affect fund balances:

Initial Allocation--used to assign initial funds to a Controlling Fund.

Transfer--used to transfer funds from one Controlling Fund to another

Fund Adjustment--used to adjust the allocation fund balance of a given Controlling Fund.

To initiate one of these transactions, click on the **Transaction** button in the Funds grid toolbar and select the appropriate transaction type from the drop-down list.



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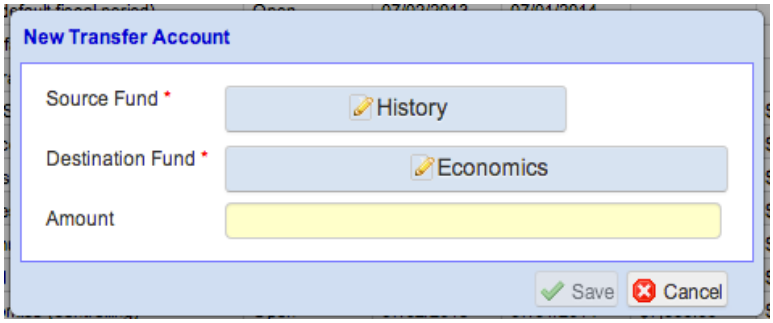
WARNING: Once monies are allocated to a fund, that fund cannot be deleted.

When you want to move dollars from one fund to another, you use the **Transfer** option. It's advisable to display your funds to see which fund will be the source for the transfer. Enter the **Source Fund** and the **Destination Fund** and the dollar **Amount** you want to transfer.

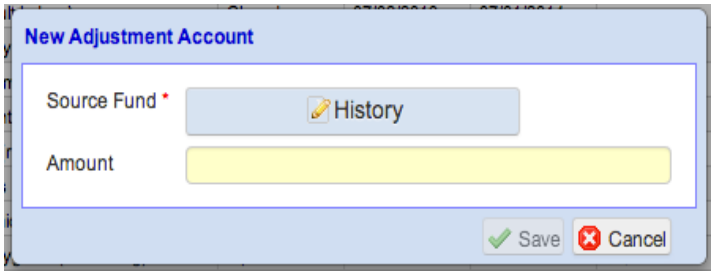
After the transaction is completed, the Funds grid will automatically refresh. The totals for the source fund and the destination fund will be changed by the amount you entered.



There may be times when circumstances require budget modifications. You will use the **Fund Adjustment** option to make these changes.

If you need to remove money from a Controlling Fund, the dollar amount is entered with a minus sign (-) immediately before the Controlling Fund. The effect of this adjustment will be a decrease of available money.

If you need to add money to a Controlling Fund, the dollar amount is entered as a whole number. This will add money to the Controlling Fund.



13.4 Setting up Locations

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Locations provide acquisitions operators with a single field to affiliate with each purchase order line copy. That field designates where the ordered copy is expected to be located after it has been received. This location field can represent a combination of fields in the DLS, such as branch/library/building, collection, shelving location and item type.

TIP: Keeping the acquisition location defined as a single field assigned to each copy reduces the number of fields that the acquisitions operator needs to enter at creation and receipt of a copy.

To ease integration with the DLS, the acquisitions module provides a mapping table called **Location to Copy Field Mapping.** This mapping table allows the operator to set up default mappings between acquisitions's concept of a location, and the various item-level fields in the DLS.

For instance, you can map a single location field to a set of DLS branch, collection, shelving location and item type fields. In this way, when the operator receives a copy in acquisitions that has **Create item on receipt** enabled, the system will allow the operator to create an item for that copy and will use the mappings to fill default values for branch, collection, shelving location and item type fields. The defaults can also be overridden prior to saving the item.

TIP: Set up a default mapping for each location you create in acquisitions to reduce the number of fields you need to enter when receiving a copy and creating an DLS item.

13.4.1 Creating and Editing Locations

Use the **Locations** link in the Configuration toolbar to open the locations grid:

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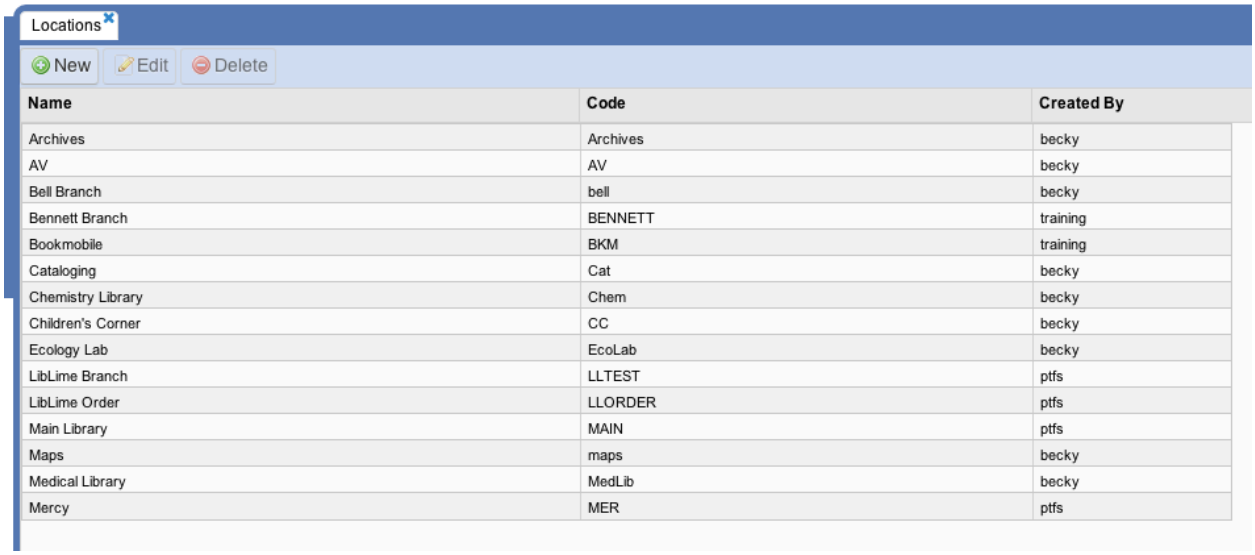
The **New** button allows you to define new location. You can create as many locations as you need.



Name	Code	Created By
Archives	Archives	becky
AV	AV	becky
Bell Branch	bell	becky
Bennett Branch	BENNETT	training
Bookmobile	BKM	training
Cataloging	Cat	becky
Chemistry Library	Chem	becky
Children's Corner	CC	becky
Ecology Lab	EcoLab	becky
LibLime Branch	LLTEST	ptfs
LibLime Order	LLORDER	ptfs
Main Library	MAIN	ptfs
Maps	maps	becky
Medical Library	MedLib	becky
Mercy	MER	ptfs

The **Edit** and **Delete** buttons allow you to edit or delete highlighted locations.

13.4.2 Location to Copy Field Mappings

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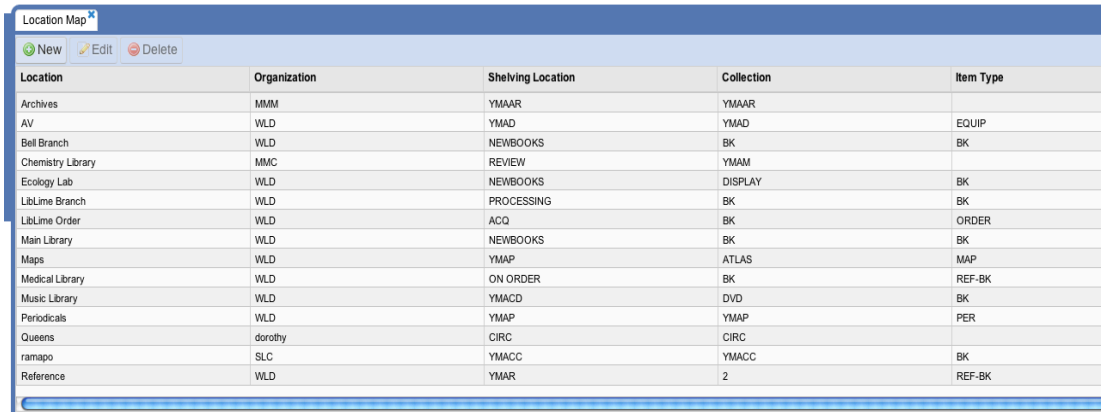
Use the **Location to Copy Field Map** navigation link to map default values for your locations to the organization/library/branch, shelving location and collection fields in the DLS.

The lists for organization, shelving location, collection and item type fields are pulled into acquisitions from the DLS so you can choose from an established list.


Location Map

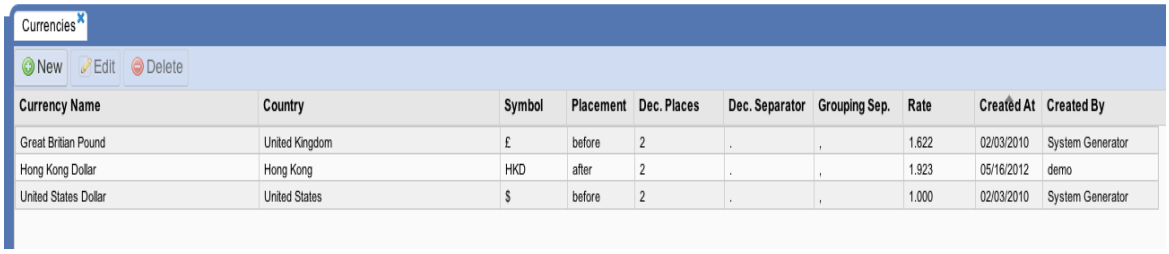
New Edit Delete

Location	Organization	Shelving Location	Collection	Item Type
Archives	MMM	YMAAR	YMAAR	
AV	WLD	YMAD	YMAD	EQUIP
Bell Branch	WLD	NEWBOOKS	BK	BK
Chemistry Library	MMC	REVIEW	YMAM	
Ecology Lab	WLD	NEWBOOKS	DISPLAY	BK
LibLime Branch	WLD	PROCESSING	BK	BK
LibLime Order	WLD	ACQ	BK	ORDER
Main Library	WLD	NEWBOOKS	BK	BK
Maps	WLD	YMAP	ATLAS	MAP
Medical Library	WLD	ON ORDER	BK	REF-BK
Music Library	WLD	YMACD	DVD	BK
Periodicals	WLD	YMAP	YMAP	PER
Queens	dorothy	CIRC	CIRC	
ramapo	SLC	YMACC	YMACC	BK
Reference	WLD	YMAR	2	REF-BK

WARNING: The acquisitions module loads item fields once when you launch the application, so if you alter your item fields you must refresh your session to pick up the new values. You can do this by clicking on the **Refresh** button of your browser.

13.5 Currencies

If you order materials from international sources, you can create currency translations to ensure that encumbrance/expenditure transactions accurately reflect current currency exchange rates.


Currencies

New Edit Delete

Currency Name	Country	Symbol	Placement	Dec. Places	Dec. Separator	Grouping Sep.	Rate	Created At	Created By
Great Britian Pound	United Kingdom	£	before	2	.	,	1.622	02/03/2010	System Generator
Hong Kong Dollar	Hong Kong	HKD	after	2	.	,	1.923	05/16/2012	demo
United States Dollar	United States	$	before	2	.	,	1.000	02/03/2010	System Generator

Acquisitions will also maintain a history of currency adjustments:

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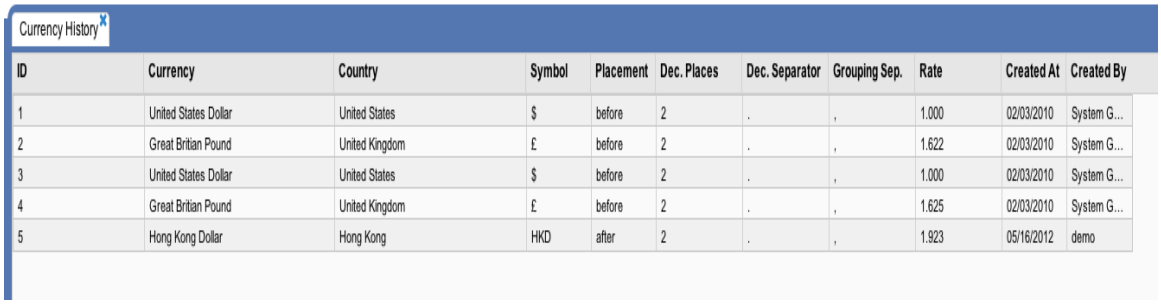
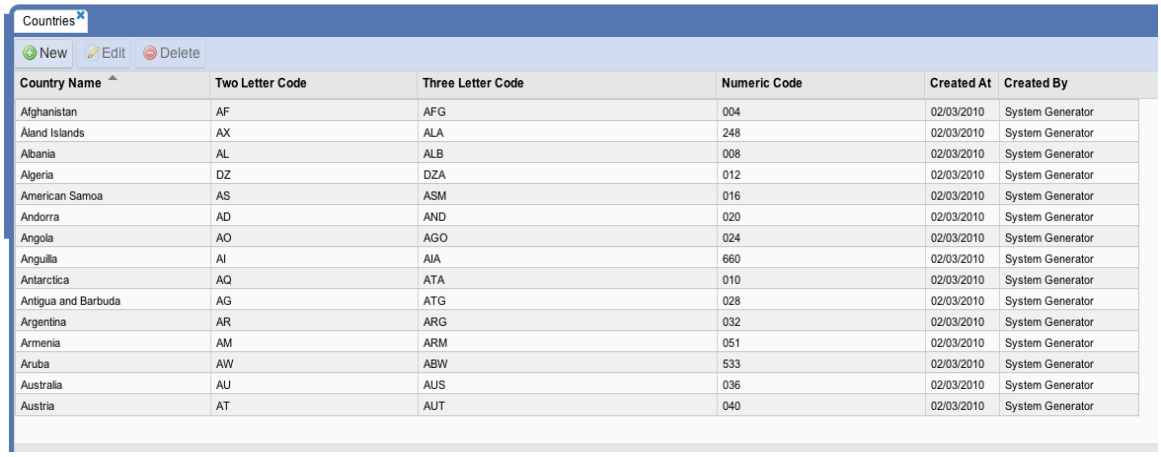

Currency History

ID	Currency	Country	Symbol	Placement	Dec. Places	Dec. Separator	Grouping Sep.	Rate	Created At	Created By
1	United States Dollar	United States	$	before	2	.	,	1.000	02/03/2010	System G...
2	Great Britian Pound	United Kingdom	£	before	2	.	,	1.622	02/03/2010	System G...
3	United States Dollar	United States	$	before	2	.	,	1.000	02/03/2010	System G...
4	Great Britian Pound	United Kingdom	£	before	2	.	,	1.625	02/03/2010	System G...
5	Hong Kong Dollar	Hong Kong	HKD	after	2	.	,	1.923	05/16/2012	demo

13.6 Countries

The system maintains a list of countries. Countries are used in vendor account addresses as well as in currency definitions.


Countries

New Edit Delete

Country Name	Two Letter Code	Three Letter Code	Numeric Code	Created At	Created By
Afghanistan	AF	AFG	004	02/03/2010	System Generator
Aland Islands	AX	ALA	248	02/03/2010	System Generator
Albania	AL	ALB	008	02/03/2010	System Generator
Algeria	DZ	DZA	012	02/03/2010	System Generator
American Samoa	AS	ASM	016	02/03/2010	System Generator
Andorra	AD	AND	020	02/03/2010	System Generator
Angola	AO	AGO	024	02/03/2010	System Generator
Anguilla	AI	AIA	660	02/03/2010	System Generator
Antarctica	AQ	ATA	010	02/03/2010	System Generator
Antigua and Barbuda	AG	ATG	028	02/03/2010	System Generator
Argentina	AR	ARG	032	02/03/2010	System Generator
Armenia	AM	ARM	051	02/03/2010	System Generator
Aruba	AW	ABW	533	02/03/2010	System Generator
Australia	AU	AUS	036	02/03/2010	System Generator
Austria	AT	AUT	040	02/03/2010	System Generator

13.7 Templates

Templates provide users a quick way to apply saved preferences to a Purchase Order Line.

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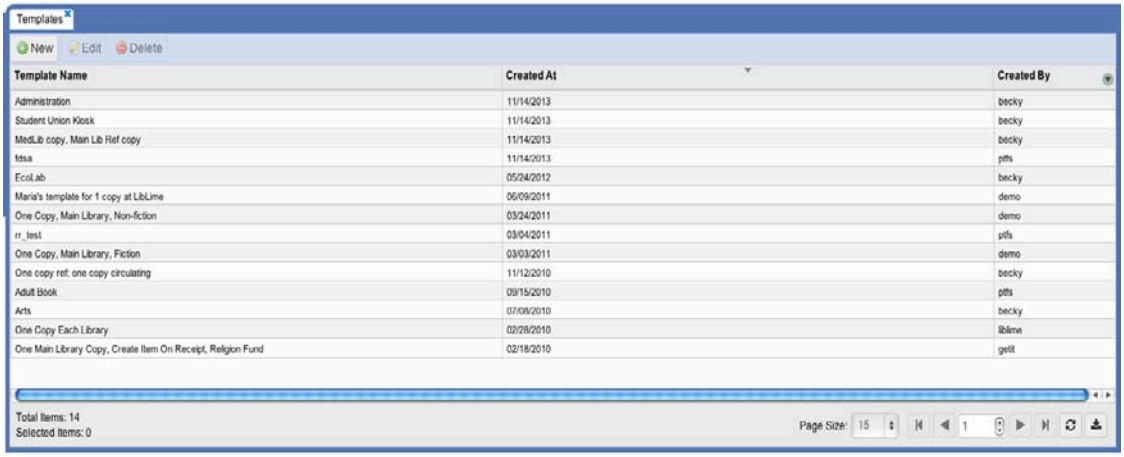
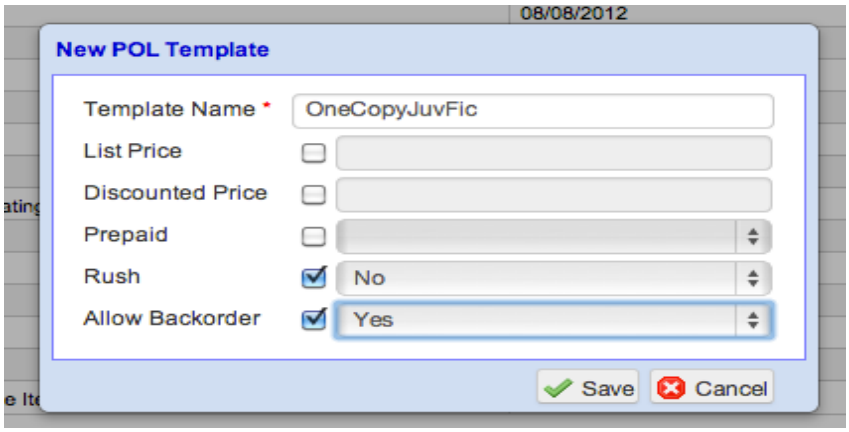

Templates
New
Edit
Delete
Template Name
Created At
Created By
Administration 11/14/2013 becky
Student Union Kiosk 11/14/2013 becky
MedLib copy, Main Lib Ref copy 11/14/2013 becky
fdsa 11/14/2013 ptfs
EcoLab 05/24/2012 becky
Maria's template for 1 copy at LibLime 06/09/2011 demo
One Copy, Main Library, Non-fiction 03/24/2011 demo
rr_test 03/04/2011 ptfs
One Copy, Main Library, Fiction 03/03/2011 demo
One copy ref: one copy circulating 11/12/2010 becky
Adult Book 09/15/2010 ptfs
Arts 07/08/2010 becky
One Copy Each Library 02/28/2010 liblime
One Main Library Copy, Create Item On Receipt, Religion Fund 02/18/2010 getit
Total Items: 14
Selected Items: 0
Page Size: 15

To create a new Template, click the **New** button. In the form, name your template and include List Price, Discounted Price, Prepaid and Rush as applicable. **Save** the form.

In previous versions of acquisitions, you couldn't make a template which would explicitly clear the "Prepaid" flag, or which set a list price of $0. The system internally interpreted all of these as "no data". Now, each template field has a selection box to enable or disable that field. If the field is disabled, it is ignored completely. If the field is enabled, that field is used to ***override the field in the PO line when the template is applied.***

For example, let's create a template which would leave price and "prepaid" alone, clear "rush", and set "allow backorder". In this example, you would disable the select box on "prepaid" and on the list and discounted price fields, enable the select boxes on the Rush and Allow Backorder, and set "rush" to NO and "allow backorder" to "yes".



Upon saving, you'll be taken to a new screen to add copies to your template. This comes in handy if you frequently order a set number of copies for each library, for example. Click **New**

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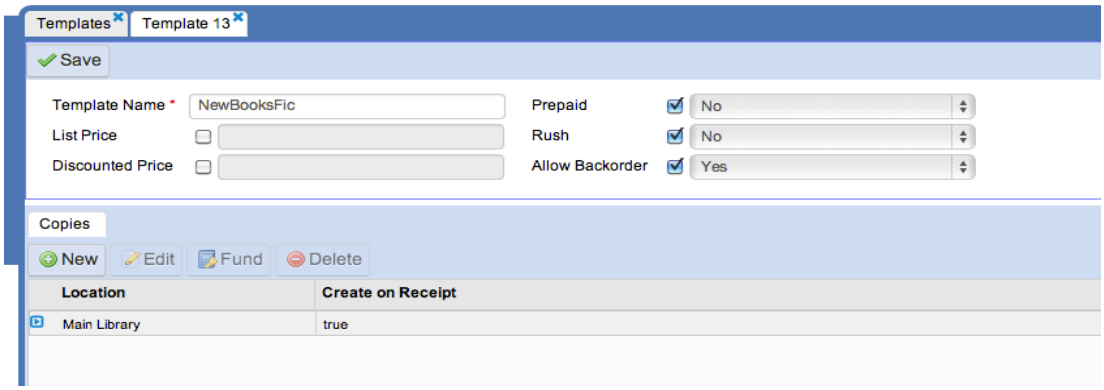
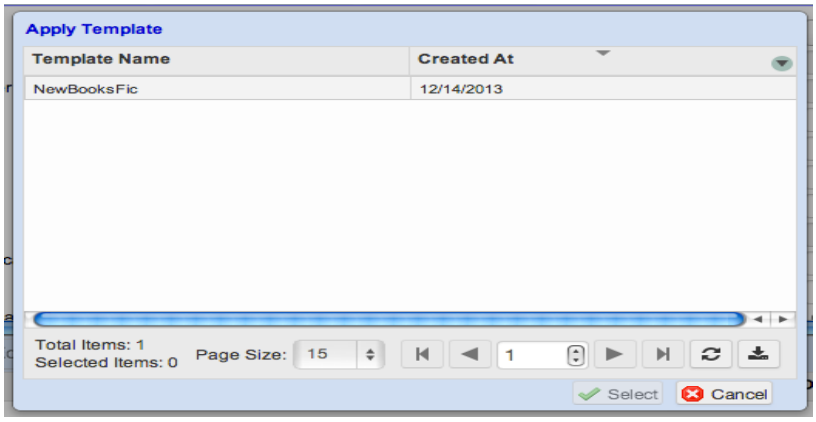
just as you would in a PO line. You can then select the appropriate location and whether or not to create an item record on receipt.



To apply a template to a PO line, create a PO and a PO line. In the Edit PO Line screen, click the **Apply Template** button. A list of available templates will appear. Choose one and click **Select**. The copies and settings from that template will be applied to the PO line.



13.8 Setting up EDI

To configure a vendor for EDI, select **EDI Targets** in the **Configuration** menu on the left.

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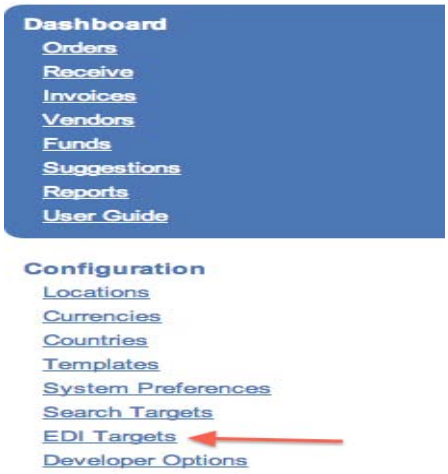
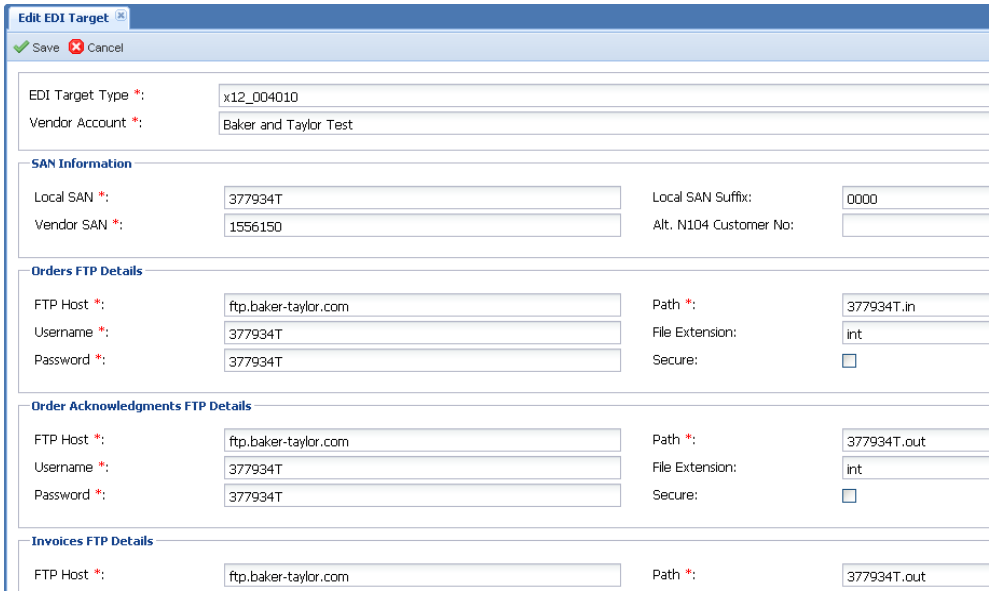


Select **New EDI Target**. This brings up a form where you can configure EDI for a given vendor account.



The form fields are:

- **EDI Target Type –** this should be set to x12_004010 (or X12_004010E for enriched EDI).

- **Vendor Account –** select the vendor account to be configured. Vendors may have multiple vendor accounts. Note that when configuring vendor accounts, you have the option of adding one or more addresses. It is not necessary to add an email address to an EDI vendor.

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- **Local SAN –** This is the library's SAN (or a vendor-assigned SAN which is used for testing)
  Local SAN suffix – the SAN suffix, if assigned

- **Vendor SAN –** the vendor's SAN

- **Alt N104 Customer No –** Most vendors require the purchaser's SAN in the N104 field of an N1 record in purchase orders. These are identified with a '15' in the N103 (identification code qualifier). Other vendors, however, request an alternative customer number in the N104, qualified with a '91' in the N103. Fill in this field to enable this alternative behavior.

- **Orders FTP Details** – the authentication and related configuration for outgoing orders (type 850 documents), including

  - FTP Host – the FTP hostname

  - Username, Password – authentication information

  - Path – the directory where outgoing orders are to be placed

  - File Extension – the extension to be used on order files. Some vendors have specific requirements for file extensions

  - Secure – Secure FTP ordering is currently unimplemented

- **Order Acknowledgments FTP Details** – configuration pertaining to incoming acknowledgments (type 855 documents).

- **Invoices FTP Details** – invoices config. Most vendors place acknowledgments and invoices in the same location, often in the same documents. In this case, this section and the previous one will be identical.

NOTE: The **Alt N104 Customer No** field should be left completely blank if the vendor wants a standard '15' qualifier in the N1 (i.e., most vendors).

Ingram: Ingram shipto account number goes in the **Alt N104 Account Number** field

13.8.1 Enriched EDI

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In order to create the appropriate 850 file for **enriched** orders, the system will need to process the following information from a user-uploaded MARC file that is brought in via the upload function on creating a PO:

Midwest:

953 $D quantity
953 $E Fund.Ledger
953 $g price (no dollar sign) -- should be discounted price; list price is in 020 $c
953 $H vendor notes
953 $J GetIt Location code
953 $x staff notes

Baker & Taylor:

954 $d quantity
954 $e Fund.Ledger
954 $g price (no dollar sign) -- should be discount price; list price is in 020 $c
954 $h vendor notes
954 $j GetIt location code
954 $x staff notes

Explanation:

954 if library uses CLS (Customized Library Services)

Acquisitions will receive **953/954** records and convert those into 952 records (this is an oversimplification; acquisitions communicates with the DLS using its own special XML format to create items, but they wind up being 952 tags in the MARC data that gets built).

A **952** is meant to represent a single item. Using it to represent multiple items (such as three books going to the same branch) means that someone could accidentally create item records that don't make any sense. The DLS will still see and use 952 tags, just as before; and when acquisitions sends a PO to the catalog, the catalog will construct 952s from its own item-level (i.e., PO line copy level) detail. List price will map to catalog $v replacement price, and discounted price to $g normal purchase price.

The 953 records are used by acquisitions to initially populate a PO with copies. If 953 $E contains just Fund (ie, not Fund.Ledger), then acquisitions will process it as the current Ledger.

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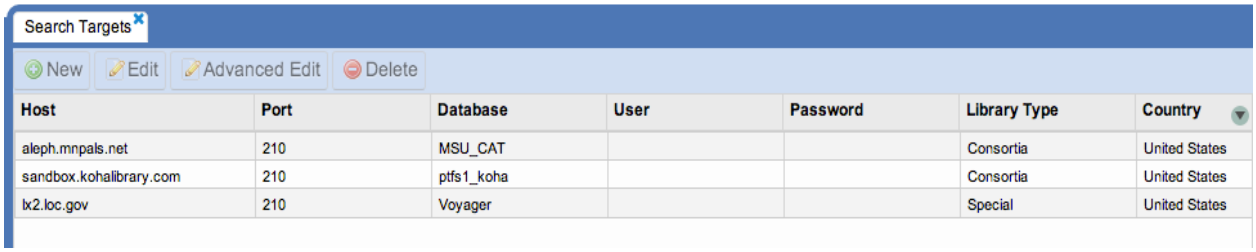
Fund names should NOT include year, since year is in Ledger. Fund name should be something like “DVD” not “DVD.2012”.

13.9 Search Targets

One of the ways to add purchase orders lines to a purchase order is **From Search**. The **Search Targets** area allows you to add search targets to this list. Search targets are z39.50 Targets for retrieving bibliographic records to attach to purchase order lines. The **Search Target** setup in **Configuration** displays a grid with the host address, the port used for z39.50 searching, the database name, the library type, and the country.



Host	Port	Database	User	Password	Library Type	Country
aleph.mnpals.net	210	MSU_CAT			Consortia	United States
sandbox.kohalibrary.com	210	ptfs1_koha			Consortia	United States
lx2.loc.gov	210	Voyager			Special	United States

Here’s an example setup for Library of Congress:

Library of Congress
Host: lx2.loc.gov
Port: 210
Database: LCDB

If you choose to search a target that requires authentication, such as OCLC, you will need to use the advanced search settings. Do this by highlighting a search target and clicking **Advanced Edit**.

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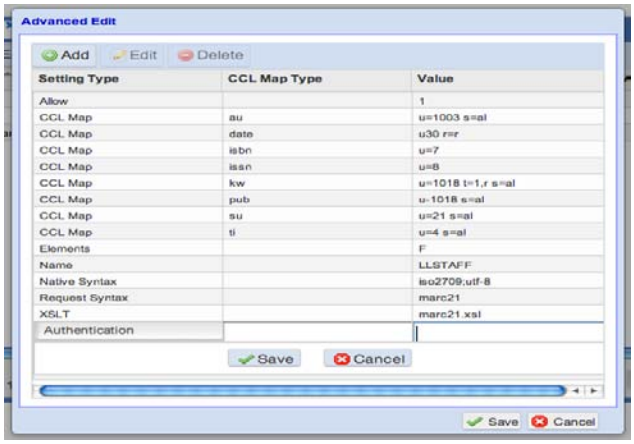


Click **Add** to add a new search setting and select **Authentication** as the setting type.

Fill in the username and password fields in the **Value** field of the setting, separated by a / (forward-slash character).

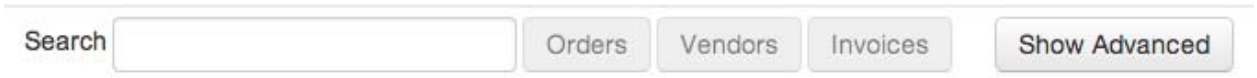
The other settings on this grid allow advanced users to alter the acquisitions mappings from CCL (Common Command Language) to z39.50 bib1 search parameters. It is recommended that only those familiar with CCL and z39.50 bib1 attempt to alter these settings.

NOTE: A maximum of 3 search targets can be configured.

13.10 Searching Within Acquisitions

13.10.1 Global Searching

The acquisitions header has a resident global search area that allows quick searching of Orders, Invoices and Vendors.



You can expand the search to reveal the advanced search options by clicking on **Show Advanced** to the right of the search buttons.

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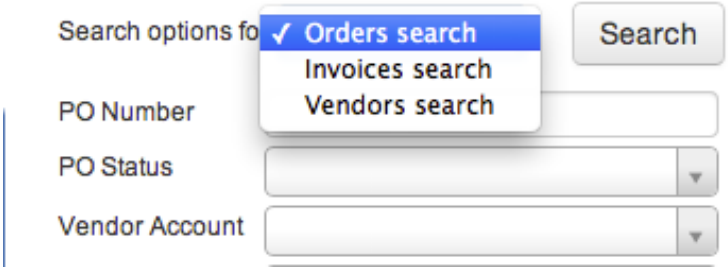
You can change the object you are searching using the **Search Options** drop-down box



The fields listed in the advanced search panel will change depending on which area you have selected to search.

The right-hand side of the **Orders and Invoices** search area allows specification of Boolean search parameters. Use the icon to add additional search parameters. You can initiate a search at any time and results will display in a new tab without interrupting any other modules you have open.

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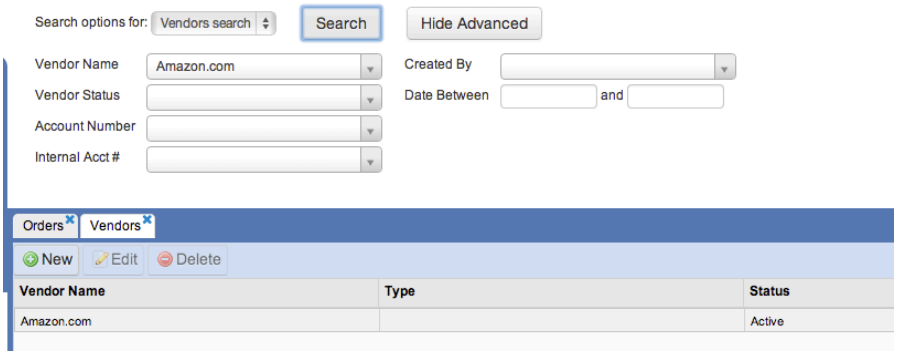

13.10.2 Search Semantics

There are four important caveats about the search system to understand.

First, the search system has no concept of "words" in the *target string*. This is because the underlying search engine, using the SQL 'LIKE' operator, only looks for substrings. For example, a search for cat would match any of the following: *cats*, *cathode*, *concatenate*, etc. This is especially surprising when you search for a PO number 1234 and find "12345".

Second, when you are searching multiple fields within a complex, multi-line structure (such as a purchase order or invoice), it is NOT required that all the fields match on the same line. For example, if you use the **Search Options** to search for author Tolstoy and title War you would find a PO which had Tolstoy's *War and Peace*. But you would also find a PO which had a line for Tolstoy's *Anna Karenina* and another line for Sun Tzu's *The Art of War*.

Third, a word (or quoted string) you search for must be found exactly as typed. Searching for Pilgrims Progress won't find *Pilgrim's Progress* because of the missing apostrophe.

Finally, searching is not case-sensitive.

13.10.3 Basic Search

Basic Search refers to the search capabilities from the **Search Vendors**, **Search Orders**, and **Search Invoices** buttons on the main page. This also applies to the *search refinement box* that appears once you've pressed any of the above buttons, wherein you can change your search content.

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A basic search looks for *all* of the words you typed in, in *any* of the *default fields*. Generally speaking, the default fields are those you would expect to be searched. In a PO, for example, this includes but is not limited to things like PO number, vendor name, and titles, authors, and ISBNs on the line items. Thus, if you enter war and peace in the search box and press **Orders Search** you would find any PO which had "war", "and", and "peace" anywhere in its default fields. An **Invoice Search** for Gatsby would find any invoices for *The Great Gatsby* ... or for that matter, a vendor named Gatsby's Wholesale Book Company.

This default behavior – to look for all of the words you enter, but not necessarily together, can be modified in several ways.

13.10.4 Conjunctive (OR) Searching

If you want to look for *any* of the words (logical conjunction) instead of *all* of the words (logical disjunction), prefix each word with a question mark. For example, an **Orders Search** for ?war ?peace would find anything which had either "war" OR "peace" anywhere in the PO. For obvious reasons you don't want to search for ?war ?and ?peace!

Note: You can combine conjunctive and disjunctive searches, but the results are not necessarily what you would expect. Searching for quick brown ?fox ?dog looks for "quick AND brown AND (fox OR dog)". However, quick brown ?fox looks for "quick AND brown AND (fox)".

13.10.5 Quoted strings

If you want to look for a *string* containing a space, instead of a *word*, you can enclose text in quotation marks. For example, searching for "art of war" (with the quotes) would match any PO which had *The Art of War*. Note that it would also match a PO which had a title *The Black Heart of Warren Buffet*, for example. Quoted strings behave just like words; you can prefix them with a ? to make them conjunctive (OR) instead of disjunctive (AND).

Note: The quoted string must be found, exactly as typed, somewhere in the target.

13.10.6 Explicit fields

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If you know what field you want to look for a term in, you can explicitly specify it in square brackets followed by an equals sign. For example, **Orders Search** for [author]=tolstoy would look for an order which any book by Tolstoy. [author]=milton [title]=paradise would similarly find Milton's *Paradise Lost* but would not find a book titled *Reading Milton*, nor a PO to a vendor named "Paradise Books". You can combine this with quotes and/or conjunctive search:

[title]="paradise lost",

for example, or

?[author]="john smith" ?[author]="jane doe".

Be aware that this hypothetical example would not find a book whose author is listed as "Doe, Jane"!

In order to explicitly specify fields you must know the *column name*. This is the name of the column in the SQL database. See Appendix 1 for a table that shows the fields and column names that are available to be searched.

13.10.7 Advanced Search

The **Show Search Options** button brings up advanced search. This gives explicit options for all the searchable fields for an object type. For example, in the **Orders Search** search options, you could fill in Maria under **Created By** and BT123 under **Vendor Account**. This would find any PO which was created by Maria and which had a vendor account of "BT123".

There are also date selection boxes which you can use to choose a date for "date between". If you wish to type in the date directly, it should be in YYYY-MM-DD format.

Orders and Invoices searches have form entries to allow you to search the PO (or invoice) lines specifically. You can select either title, author, or ISBN/ISSN. ISBN/ISSN also searches ISMN, UPC, and EAN13. You can choose one of six ways to search:

contains – the EXACT STRING must be found somewhere in the field. For example, the author "Melville, Herman" contains *Melville*. It does NOT contain *Melville Herman* (no comma) nor *Herman Melville* (wrong order and no comma).

all words – all of the words must be found in the field. "Melville, Herman" DOES match an **all words** search for *Herman Melville* or for *Melville Herman*.

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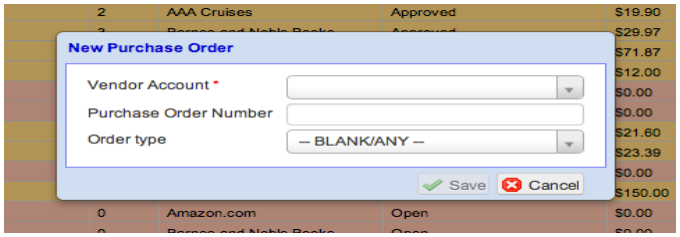
any words – similar to **all words** except any of the words must be found, not all.

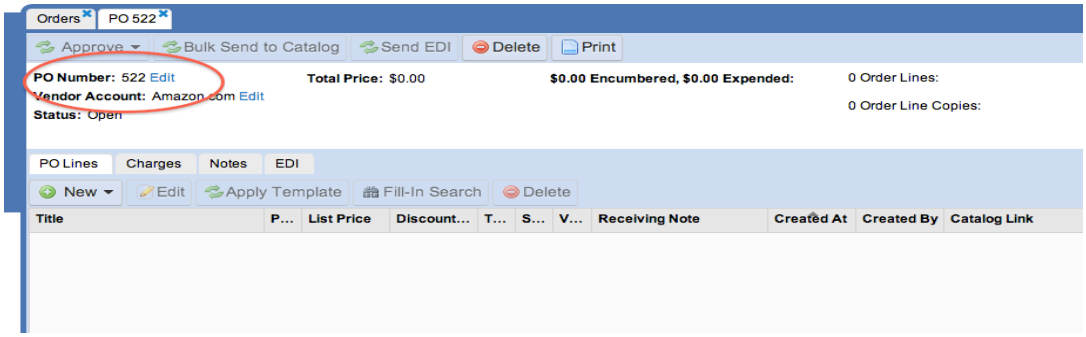
less than, more than, equals – these do numeric comparisons, useful for ISBN/ISSN searches.

13.11 Creating a Purchase Order

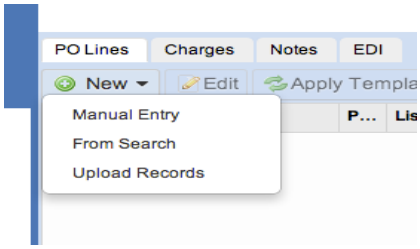
The Vendor Account is assigned when a new Purchase Order is created:



Purchase Order Number can be entered or will be auto-assigned:



Purchase order lines (POL s) are adding to the Purchase Order (PO) via the **New** button, and can be added **Manual Entry**, **From Search** of any z39.50 target, or via File **Upload Records**:



When you choose **Manual Entry**, the basic PO Line Entry Form will be displayed. Fill in as much information as you have available, including the List Price and Discounted Price:

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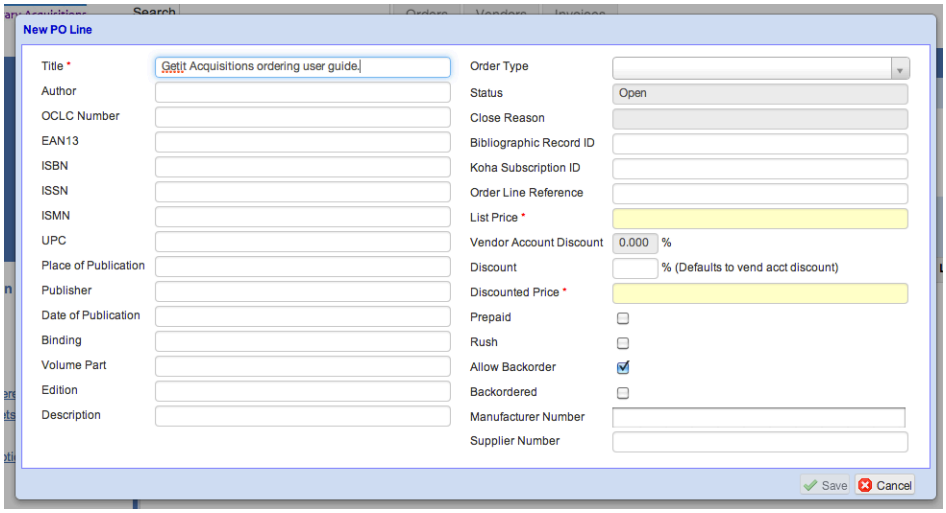
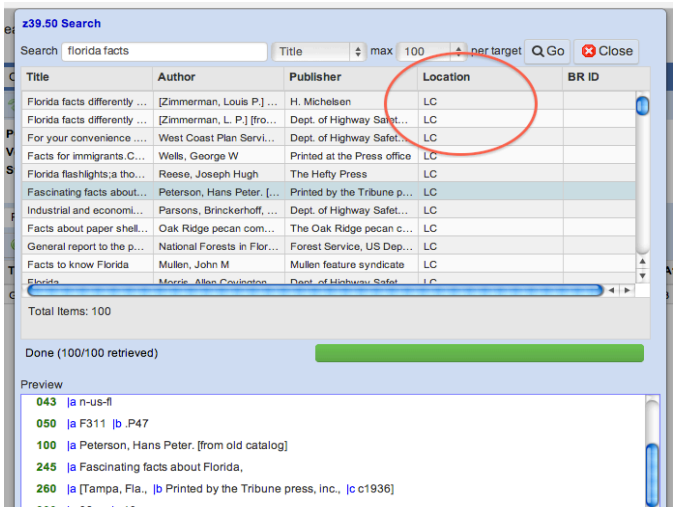


Choosing the add PO line **From Search** option will display a z39.50 search window and allow you to search any target already set up in **Configuration \ Search Targets**. The results display will also indicate from which target the results were retrieved:



If your search finds a **Bibliographic Record** that currently exists in your database, the BR ID (Bib Record Identifier) column will include the Bibliographic Record Identifier.

The lower pane of this window provides a preview of a selected **Bibliographic Record**. To preview a different **Bibliographic Record**, highlight a different **Bibliographic Record**.

When you find a **Bibliographic Record** that matches the title you want to order, double-click on the **Bibliographic Record** within the results area to download the bibliographic information into a Purchase Order Line:

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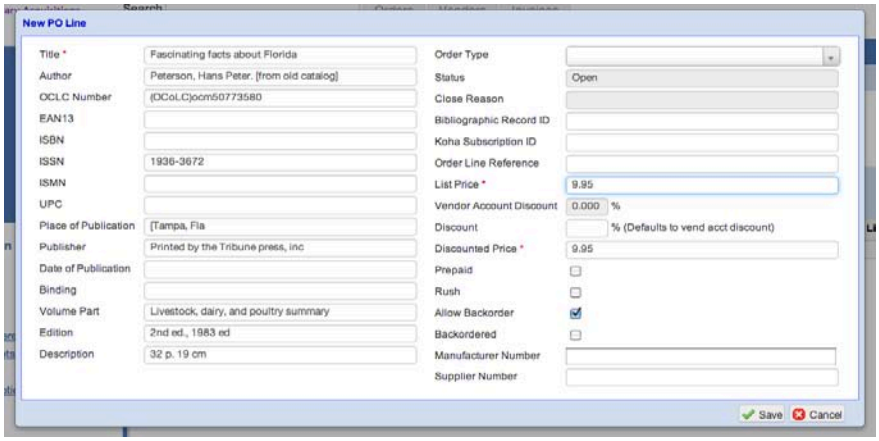
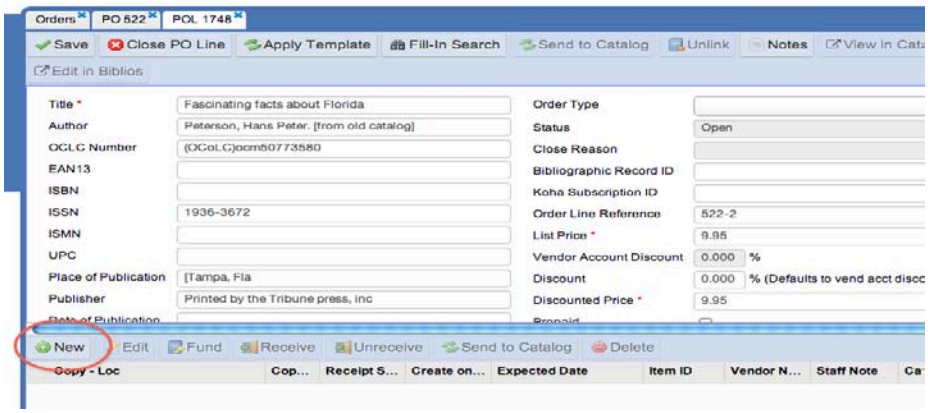


After you have entered a PO Line, the PO Line form will refresh with some additional header and footer information and you can create one or more Copies. To create a new Copy, click the **New** button on the bottom of the split window display:



Each Copy you order for this Purchase Order Line will have one Copy entry. The Copy includes:

- Location, from the list of locations defined in the Acquisitions Locations configuration.
- Copy Identifier
- Receipt status
- Create Item on receipt check-box
- Expected Date
- Vendor Note
- Staff Note
- Catalog link (to display in the Discovery Layer)

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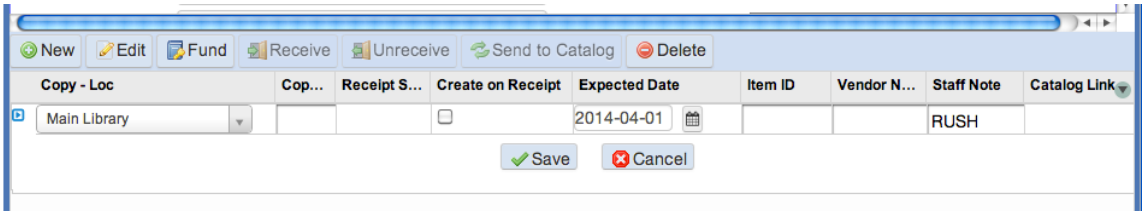
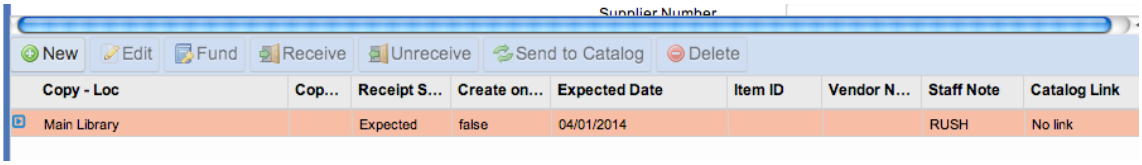


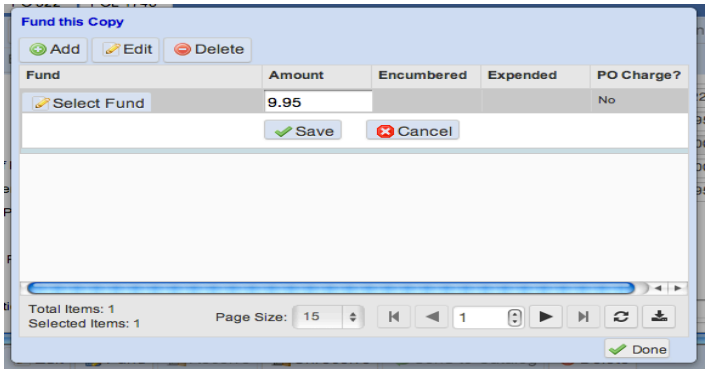
Note that each Copy will be pink-colored after it has been saved. This indicates that the Copy is not yet funded:



WARNING: All copies must be fully funded before the system will allow a PO to be sent to the Vendor.

13.12 Funding a PO Line

You can specify multiple funding sources for a given copy. First, highlight the copy. Notice that the Fund button is now active. Click on the **Fund** button. The Fund this Copy form displays:



Click the **Add** button to choose a fund from the fund hierarchy:

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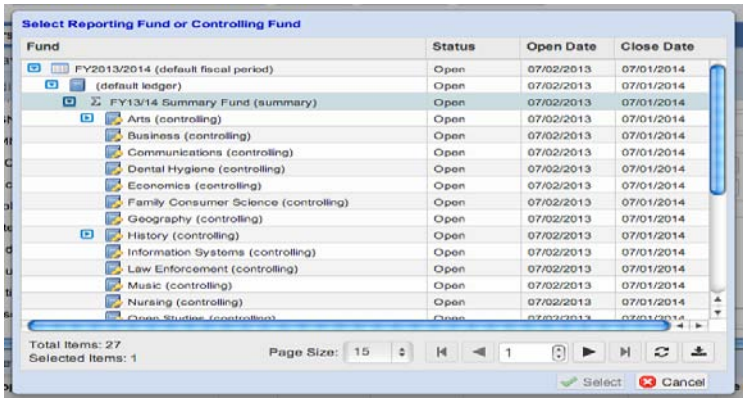
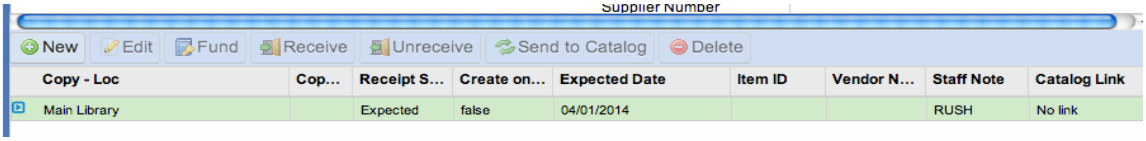
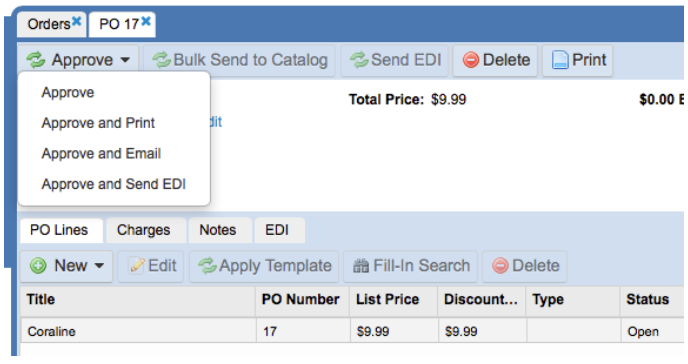


After the Funding for that Copy is saved, the Copy's background color changes from red to green. A green background means that this Copy is fully-funded:



13.13 Transmitting a Purchase Order

When all titles have been attached as funded PO Lines, the order is ready to send to the vendor. Sending the PO to a vendor is the action that encumbers or expends funds (depending on the value of the 'prepaid' field in the PO Line record). Click the **Approve** button (or Approve and Send EDI if vendor has been set up for EDI transmission):



After you click on the **Approve** button, the Purchase Order status changes to Sent and the encumbered/expended amounts, the relevant funds, and how many copies are expected are displayed in the PO header:

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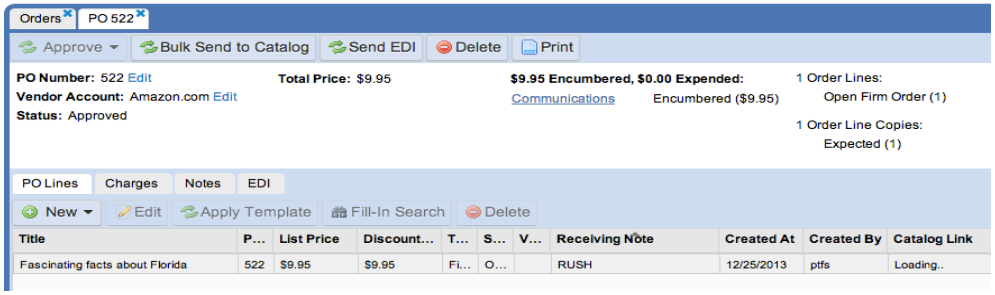
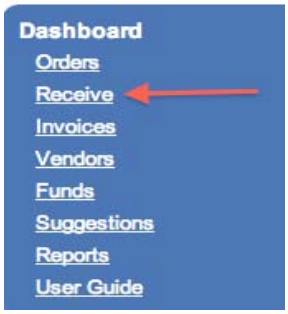
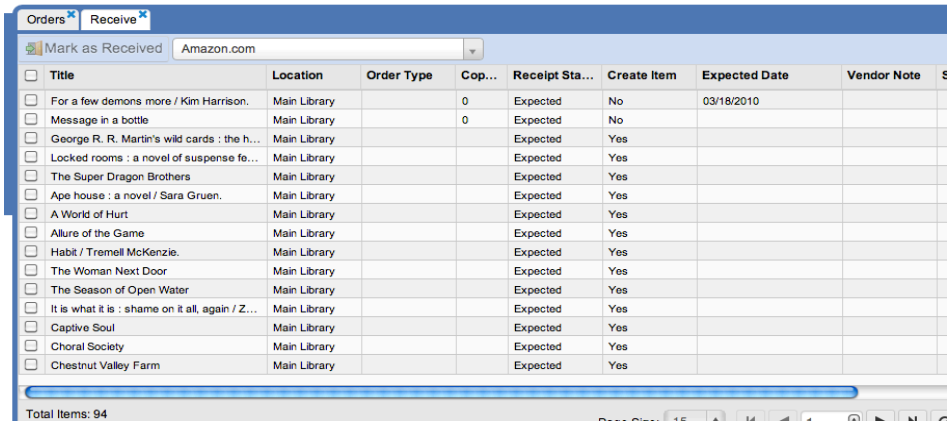


13.14 Receiving

Receiving can be done independently or connected with the **Invoice** process. If materials are received separately from the invoice, the Receipt process is initiated by clicking the **Receive** link on the Dashboard:



A pop-up window will appear with a drop-down box to select the vendor, just as in the creation of a Purchase Order. Once the vendor is selected, a list of outstanding orders for that vendor will appear:



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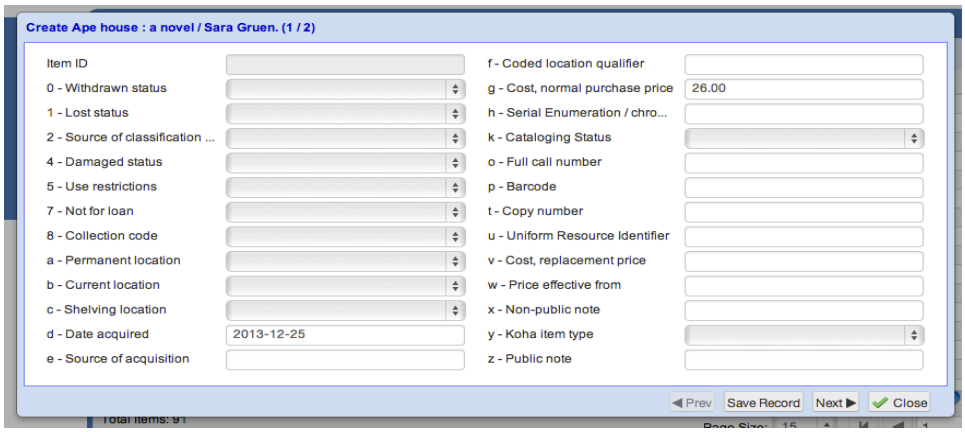
If, at the point of order, the PO Line was marked with the “Create Item on Receipt” option, a pop-up window will appear to create an item at this time:

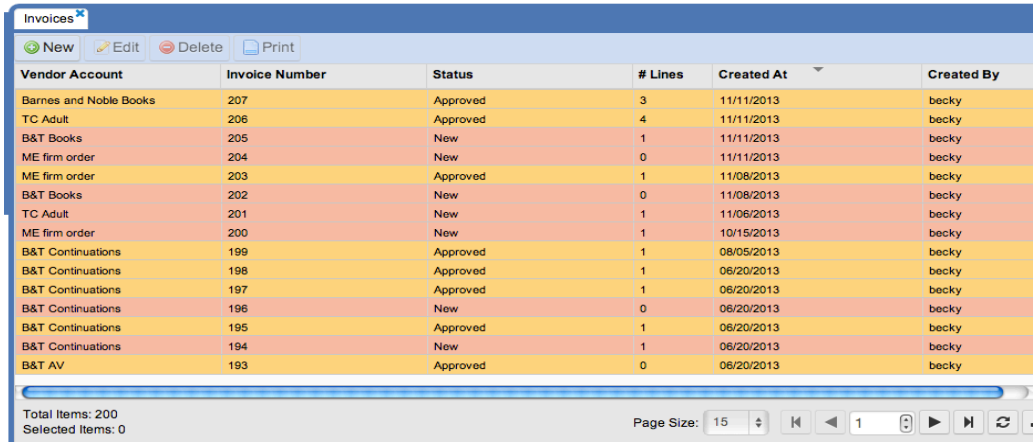

Create Ape house : a novel / Sara Gruen. (1 / 2)
Item ID
0 - Withdrawn status
1 - Lost status
2 - Source of classification ...
4 - Damaged status
5 - Use restrictions
7 - Not for loan
8 - Collection code
a - Permanent location
b - Current location
c - Shelving location
d - Date acquired
2013-12-25
e - Source of acquisition
f - Coded location qualifier
g - Cost, normal purchase price
26.00
h - Serial Enumeration / chro...
k - Cataloging Status
o - Full call number
p - Barcode
t - Copy number
u - Uniform Resource Identifier
v - Cost, replacement price
w - Price effective from
x - Non-public note
y - Koha item type
z - Public note
Prev
Save Record
Next
Close

Otherwise, items are selected to Receive and the window is closed.

13.15 Invoicing

After placing an order, the Vendor will typically supply an Invoice detailing the material that has been included in one or more shipments. Sometimes, the invoice will be provided with the shipment; other times it will precede or follow the shipment. The system provides for all three of these possibilities.

To access the Invoices module, click on Invoices in the **Dashboard** area within navigation. A list of existing Invoices will be displayed—those highlighted in red are new and those with a yellow background are approved:


Invoices
New
Edit
Delete
Print
Vendor Account | Invoice Number | Status | # Lines | Created At | Created By
Barnes and Noble Books | 207 | Approved | 3 | 11/11/2013 | becky
TC Adult | 206 | Approved | 4 | 11/11/2013 | becky
B&T Books | 205 | New | 1 | 11/11/2013 | becky
ME firm order | 204 | New | 0 | 11/11/2013 | becky
ME firm order | 203 | Approved | 1 | 11/08/2013 | becky
B&T Books | 202 | New | 0 | 11/08/2013 | becky
TC Adult | 201 | New | 1 | 11/06/2013 | becky
ME firm order | 200 | New | 1 | 10/15/2013 | becky
B&T Continuations | 199 | Approved | 1 | 08/05/2013 | becky
B&T Continuations | 198 | Approved | 1 | 06/20/2013 | becky
B&T Continuations | 197 | Approved | 1 | 06/20/2013 | becky
B&T Continuations | 196 | New | 0 | 06/20/2013 | becky
B&T Continuations | 195 | Approved | 1 | 06/20/2013 | becky
B&T Continuations | 194 | New | 1 | 06/20/2013 | becky
B&T AV | 193 | Approved | 0 | 06/20/2013 | becky
Total Items: 200
Selected Items: 0
Page Size: 15
1

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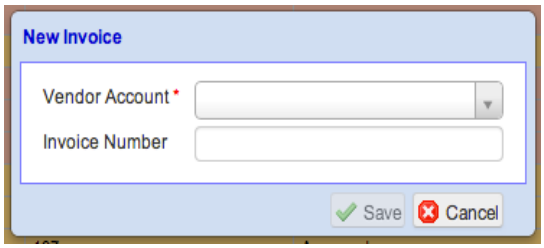
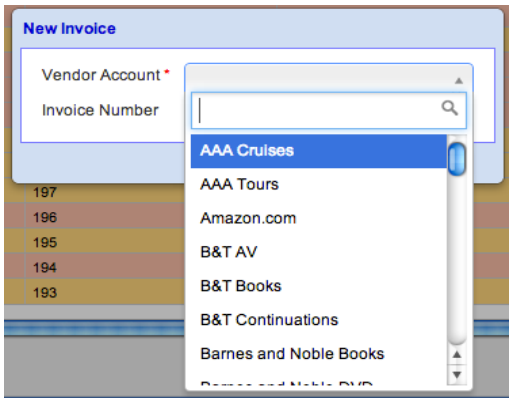
Record a new Invoice by clicking on the **New Invoice button.**



Click on the drop-down arrow for the list of current Vendor Accounts; you can also type the first letter of Vendor Account, which will also retrieve the list of current Vendor Accounts:



If the invoice number from Vendor is not completed, the system will auto-generate the next sequential invoice number available.

Copies are added to an Invoice by searching for an existing Purchase Order (**Add from PO**), or by manually entering a title (**Add Title**). This is often used in library workflows for Standing Orders processing:

Add from PO will display a list of purchase order lines on order for the chosen vendor. If titles had not been previously received, the **Mark as received** option is available at the bottom of the **Add PO Lines to this Invoice** window:

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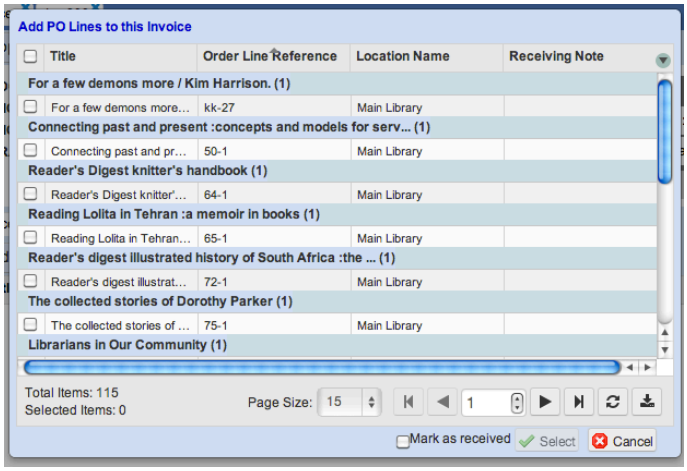
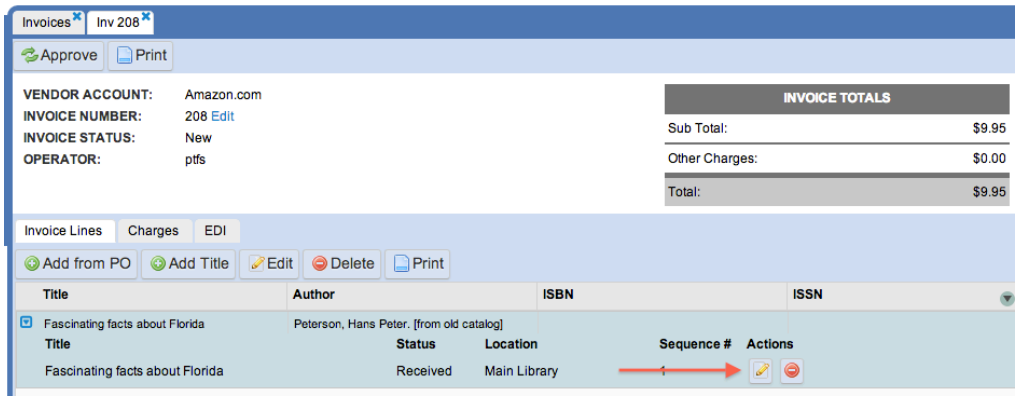


If the dollar amount on the Invoice is not the same as in the Purchase Order record, you can edit the Invoice line by clicking the pencil icon:



You can also adjust the Fund distribution for Invoice Copies and this will not affect the Purchase Order Line Copies Funding.

The final step is to **Approve** the Invoice for payment. This also updates your funds—encumbrances will be credited and expenditures will be debited.

13.16 Purchase Suggestions

Purchase Requests allow patron-initiated purchase suggestions from the Discovery Layer to be managed by Acquisitions. The **Purchase Requests** option is located on the left side of the acquisitions dashboard and will display all suggestions:

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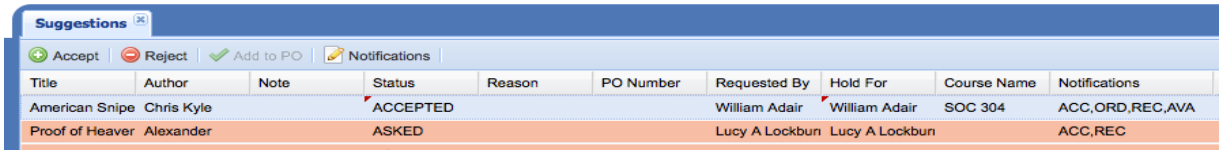
Patron suggestions are initiated via the Discovery Layer (see that section for more details).

Library staff review recent suggestions and click the green **Accept** or red **Reject** button to accept or reject the suggestion. If the patron has elected to be notified upon various status changes, the "Notifications" column will display these statuses:



In the screen capture above, patron Lucy Lockburner has requested the title "Proof of Heaven" and has indicated she would like to be notified upon Acceptance of the Request (ACC) and Receipt of the title in the library (REC). The patron can choose to be notified when suggestion is:

- Accepted (ACC)
- Rejected (REJ)
- Ordered (ORD)
- Received (REC)
- Available (AVA)

NOTE: A Suggestion must be **approved** (Accepted) before it can be added to a PO and a PO must already be created.

Suggestions are added to a Purchase Order by first **Approving** and then selecting **Add to PO**. Note that the **Add to PO** button is not available until a Suggestion has been approved:

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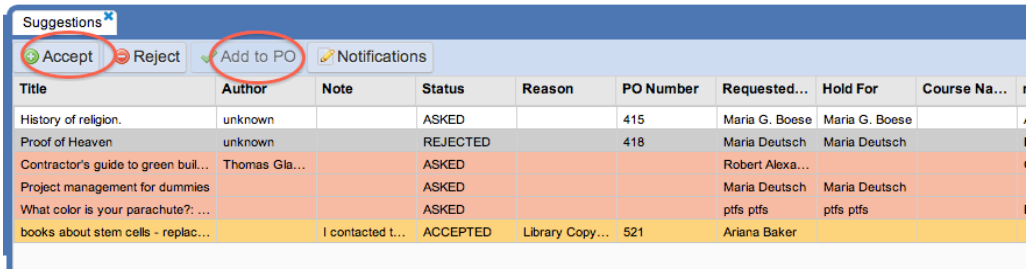
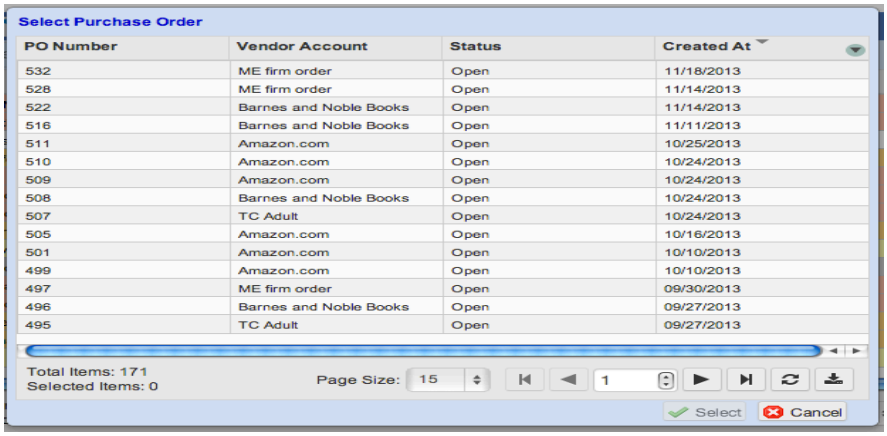


Once titles have been accepted for purchase, the **Add to PO** button will activate. Clicking it will present a list of current open POs:



Click the **Select** button to add suggestions to a purchase order.

13.17 Standing Orders

Most libraries already have a number of titles on order with a continuations/standing order vendor. The orders are usually placed on selected titles for which it's important to ensure uninterrupted receipt of updates or new editions or part. A standing order helps simplify the acquisitions process because library staff do not need to remember to check for new editions or parts. These titles may arrive at any time, and usually are accompanied with an invoice.

Acquisitions provides the capability to manage standing orders either completely in acquisitions, or in conjunction with the DLS Serials module. Benefits of using this feature include a streamlined process that provides historical price information, new functionality that permits creating an invoice without first creating a purchase order, and the ability to create the workflow that works best for your library.

NOTE: the words 'continuation' and 'standing order' are used interchangeably

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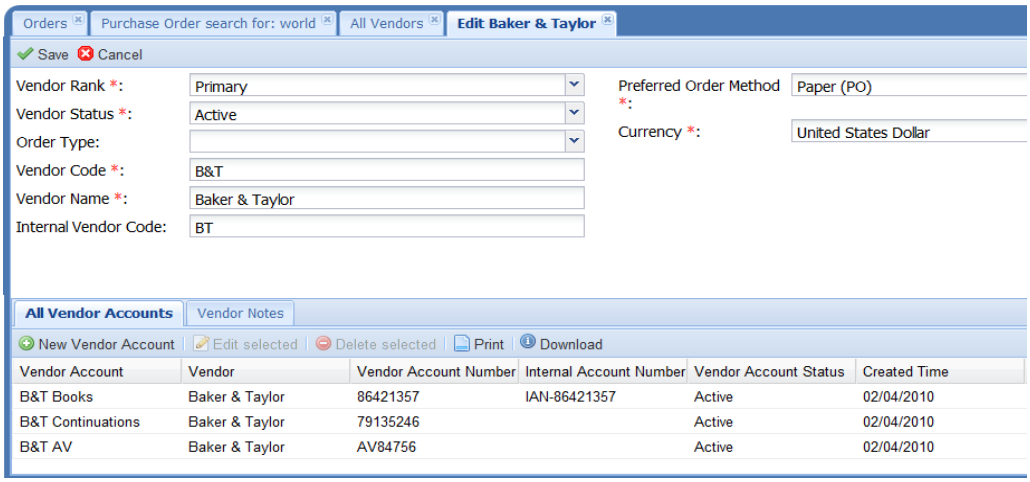
13.17.1 Continuations/Standing Orders Setup

13.17.1.1 Vendors

Review your vendor **accounts** to ensure that you have continuation accounts created. Some vendors create multiple accounts, with one account usually being for continuations. The example below shows a vendor record that has multiple accounts.



13.17.1.2 Order Types

You can set the order type at the vendor record level, the vendor account level, the purchase order (PO) or the purchase order line (POL). When an order type is entered at the vendor record level or the vendor account level, the order type field will be populated in the PO and the POL. If you have one account with a vendor, but want to identify the order type in the PO or the POL, leave the order type in the vendor and vendor account blank.

The **Standing Order** order type has functionality that provides a workflow that is slightly different from a Firm Order. An additional order type—Continuation Instance—has been added to the drop down list and is used specifically with a standing order PO.

NOTE: When a PO has an order type of Standing Order, any subsequent receipt of the same title will create a new POL with an order type of Continuation Instance.

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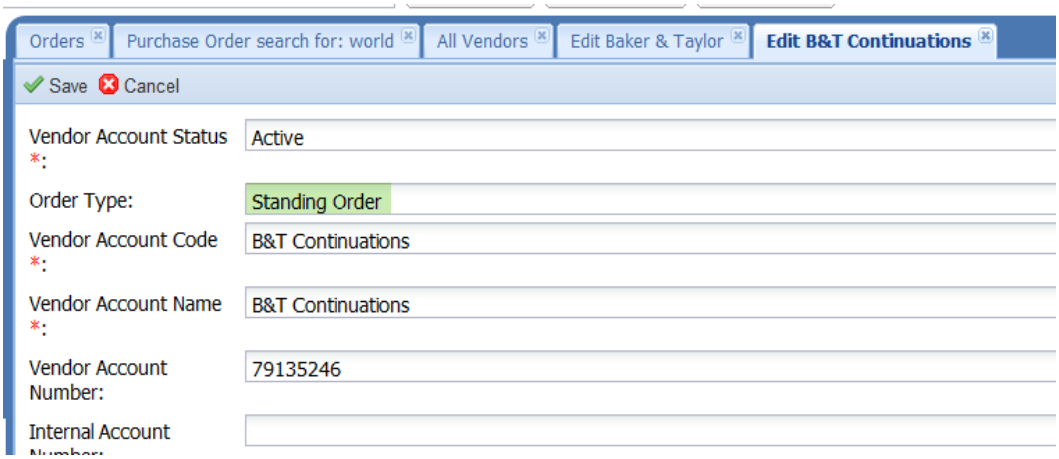
The following figure is a vendor account record and shows that this specific account is set in the vendor record. Any PO or POL that uses this vendor account will automatically have the order type set to Standing Order:



13.17.1.3 Funds

There is no specific action for funds that needs to be done before beginning to create standing order purchase orders. If you want to track the amount spent on continuations, it may be useful to create a fund for them.

13.17.2 Ordering Standing Orders

Creating a standing order purchase order is essentially the same as creating one for a firm order. There are some important differences, however.

Selecting the order type ‘Standing Order’ will place this PO in everlasting openness.

After clicking on **New Purchase Order**, choose the vendor. If the vendor account includes an order type, it will automatically be added. If the vendor account doesn’t include an order type, this field will be blank, and you can select the order type from the drop-down choices. If you click Save without adding an order type, there will be one more opportunity to identify this purchase order with the Standing Order type.

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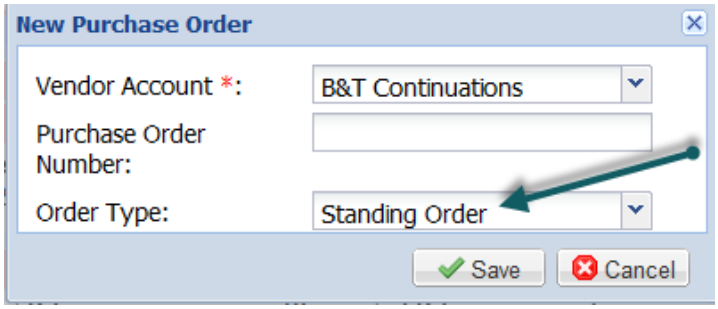
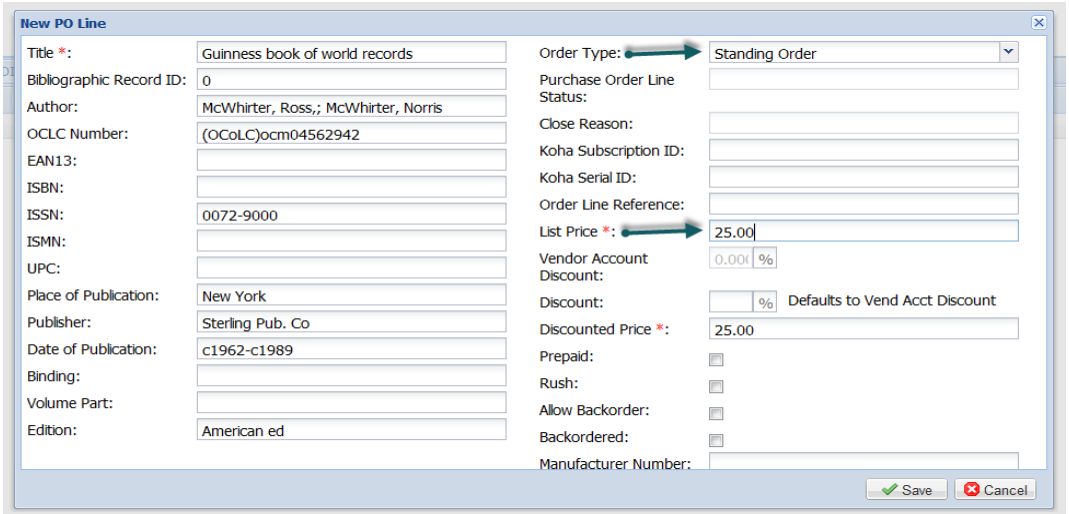


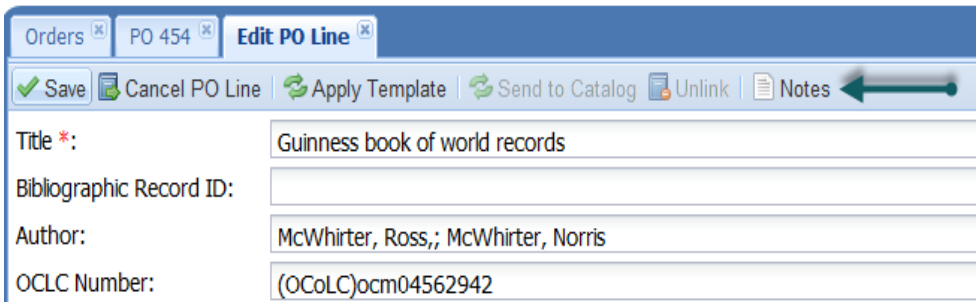
Next, add a new PO line. Either key in the information manually or download from a search.



The Order Type will be empty. If you've already selected the order type in a previous step, you can leave this field blank. The required field **List Price** needs to have a price entered; adding the List Price will automatically fill the Discounted Price.

After the record has been saved, continue the ordering workflow by adding a copy and assigning a fund.

You can also add receiving notes to a POL that will display while receiving the item. The POL has a new **Notes** button in the toolbar.



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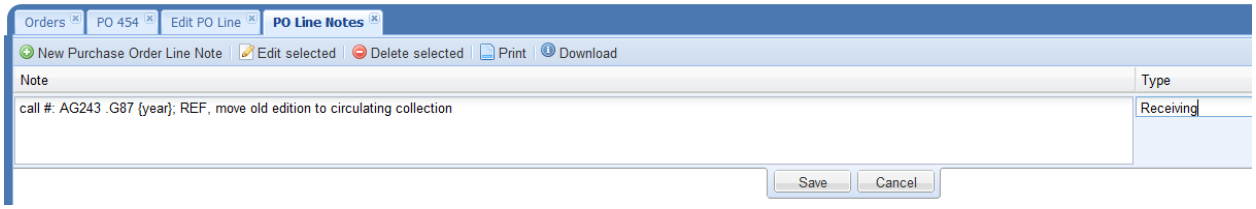
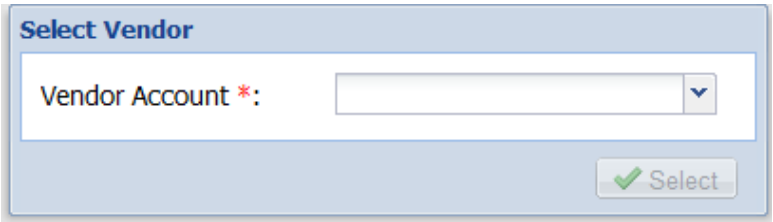
There is a new **Receiving note** option which allows entry of notes for each POL. A new note type of Receiving is available in the Type column. These notes will appear on the PO line grid, the Receiving grid and the Invoicing 'POLC Finder' windows. You can enter a long note; be aware that the display area in the three windows may not display your entire note. For continuations, it may be useful to include the call number, location and handling instructions.



13.17.3 Receiving Standing Orders

There are two possible workflows for receiving. The first one is to receive the item after clicking on Receiving in the Dashboard. The second is to receive items during invoicing and will be described in the Invoice section below.

To receive items, click **Receive** on the left side of the acquisitions main Dashboard. A pop-up window will appear with a drop-down box to select the vendor. Choose the appropriate vendor for the items you are receiving and click the **Select** button:



A list of the titles to be received from that vendor will be displayed:

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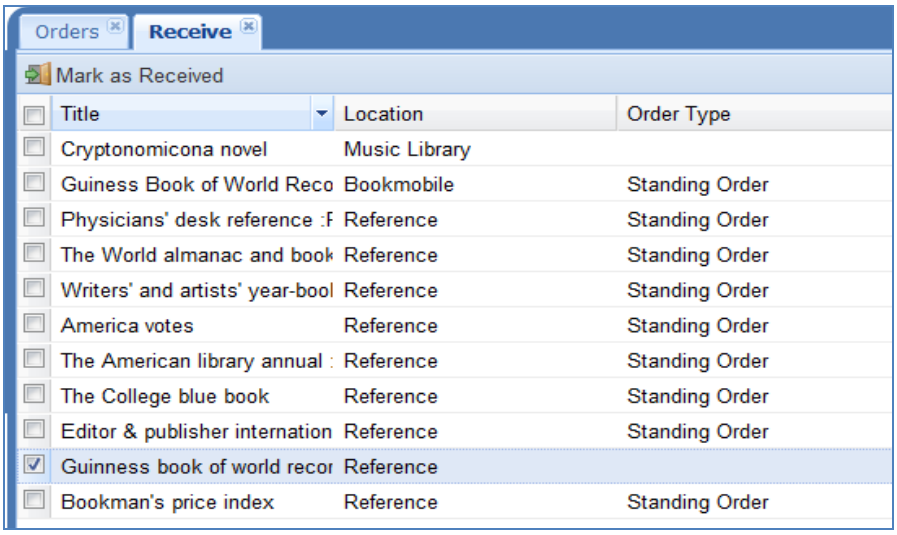
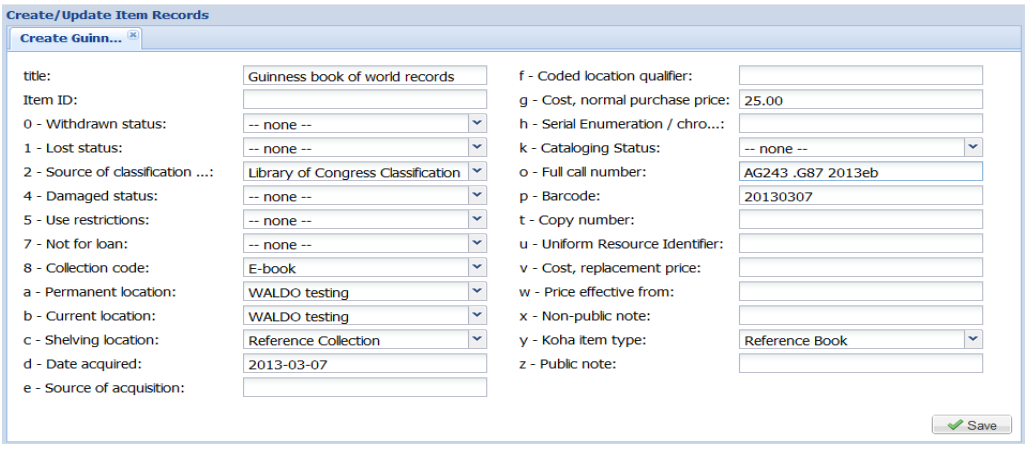
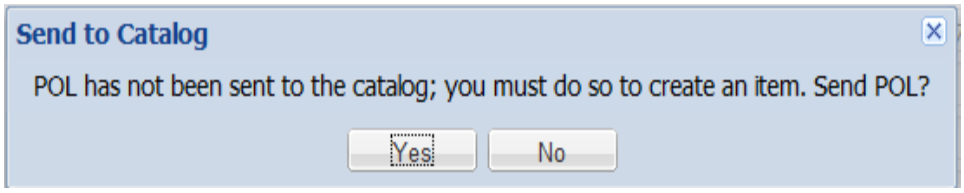

Orders
Receive
Mark as Received
Title
Location
Order Type
Cryptonomicona novel Music Library
Guiness Book of World Reco Bookmobile Standing Order
Physicians' desk reference :F Reference Standing Order
The World almanac and book Reference Standing Order
Writers' and artists' year-bool Reference Standing Order
America votes Reference Standing Order
The American library annual : Reference Standing Order
The College blue book Reference Standing Order
Editor & publisher internation Reference Standing Order
Guinness book of world recor Reference
Bookman's price index Reference Standing Order

After each item in the shipment has been marked, click the **Mark as Received** button. If you chose to create an item record on receipt for these titles when you created your purchase order, the next display will be an item form:


Create/Update Item Records
Create Guinn...
title: Guinness book of world records
Item ID:
0 - Withdrawn status: -- none --
1 - Lost status: -- none --
2 - Source of classification ...: Library of Congress Classification
4 - Damaged status: -- none --
5 - Use restrictions: -- none --
7 - Not for loan: -- none --
8 - Collection code: E-book
a - Permanent location: WALDO testing
b - Current location: WALDO testing
c - Shelving location: Reference Collection
d - Date acquired: 2013-03-07
e - Source of acquisition:
f - Coded location qualifier:
g - Cost, normal purchase price: 25.00
h - Serial Enumeration / chro...:
k - Cataloging Status: -- none --
o - Full call number: AG243 .G87 2013eb
p - Barcode: 20130307
t - Copy number:
u - Uniform Resource Identifier:
v - Cost, replacement price:
w - Price effective from:
x - Non-public note:
y - Koha item type: Reference Book
z - Public note:
Save

If you have not sent the bibliographic record to the catalog yet, you'll be prompted to do so now.



If this is the first time you've received this title, answer yes.

After you've received the first copy of a standing order title, the next time you receive the same title, the Receive display will show that this title is a Standing Order and any Receiving Notes you've added will be displayed.

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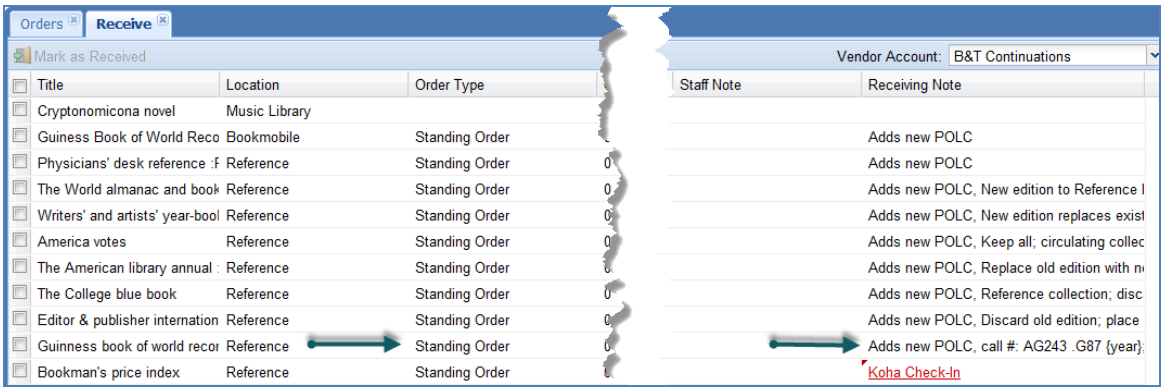
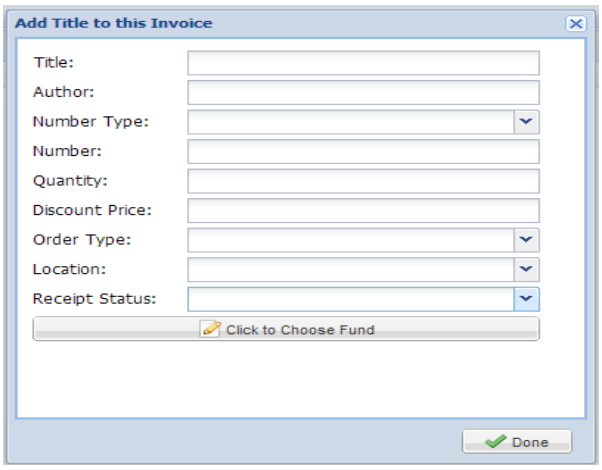

Orders
Receive
Mark as Received
Vendor Account: B&T Continuations
Title
Location
Order Type
Staff Note
Receiving Note
Cryptonomicona novel Music Library
Guiness Book of World Reco Bookmobile Standing Order Adds new POLC
Physicians' desk reference :F Reference Standing Order Adds new POLC
The World almanac and book Reference Standing Order Adds new POLC, New edition to Reference I
Writers' and artists' year-bool Reference Standing Order Adds new POLC, New edition replaces exist
America votes Reference Standing Order Adds new POLC, Keep all; circulating collec
The American library annual Reference Standing Order Adds new POLC, Replace old edition with n
The College blue book Reference Standing Order Adds new POLC, Reference collection; disc
Editor & publisher internation Reference Standing Order Adds new POLC, Discard old edition; place
Guinness book of world recor Reference Standing Order Adds new POLC, call #: AG243 .G87 {year}
Bookman's price index Reference Standing Order Koha Check-In

13.17.4 Receive and Invoice

When a shipment of items is received from your continuations vendor, you can accomplish receiving and invoicing without the need to create a purchase order first. There are two methods available to use—by adding from a PO and by adding a title.

The steps to add from a PO remain unchanged. The **Add PO Lines to this Invoice** window now displays the receiving notes added to the POLC. After the items are selected and appear in the Invoice Lines tab, the invoice amount will probably need to be updated.

The Add Title button provides an alternative way to receive and invoice continuations. Clicking on the button brings up this form:



The fields are:

Title: The title

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Author:	The author
Number Type:	Select from ISBN, ISSN, ISMN, EAN13 or UPC
Number:	Actual number
Quantity:	Number of items received
Discount Price:	Amount for one item
Order Type:	Select from drop down list
Location:	Select from drop down list
Receipt Status:	Select from Expected or Received

After all items in the shipment have been entered into the invoice, the invoice can be approved. Acquisitions will automatically create a purchase order with the same information populating the fields entered in the form. The created purchase order number will be formatted as 'INV-182.'

13.18 Link to Serials

Some libraries may order yearbooks, annuals, or other continuing resources from a subscription agent, and each time an issue is received, a bill for payment comes with it. Libraries that have implemented both serials and acquisitions now have the ability to create a purchase order line simply by receiving the next expected issue.

Subscription agencies can supply almost any publication that has a predictive publishing schedule. If you subscribe to some annuals, yearbooks, or other titles through your subscription agency, you probably already have Serial Subscription MARC records in your database. If your annual subscription invoice predicts a price for the title, a serials receipt may be all that is necessary. However, if you receive an invoice when the title is received, you can now send purchase information from the serials module to acquisitions and track the invoice and payment information.

Creating the link in the serial subscription record is easily done. When editing or creating a subscription record, there are two lines that appear under the Biblio number and title. The default value is '*do not create a GetIt PO line when receiving this serial*.'

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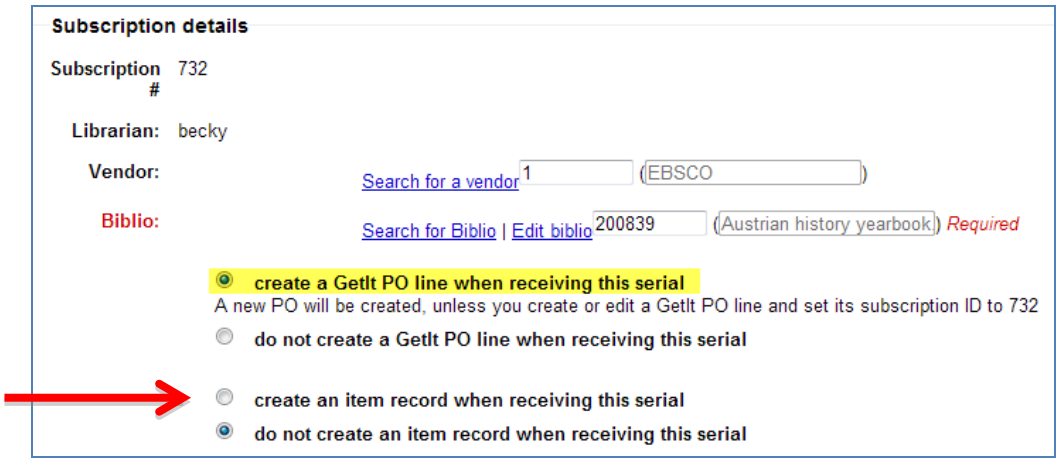
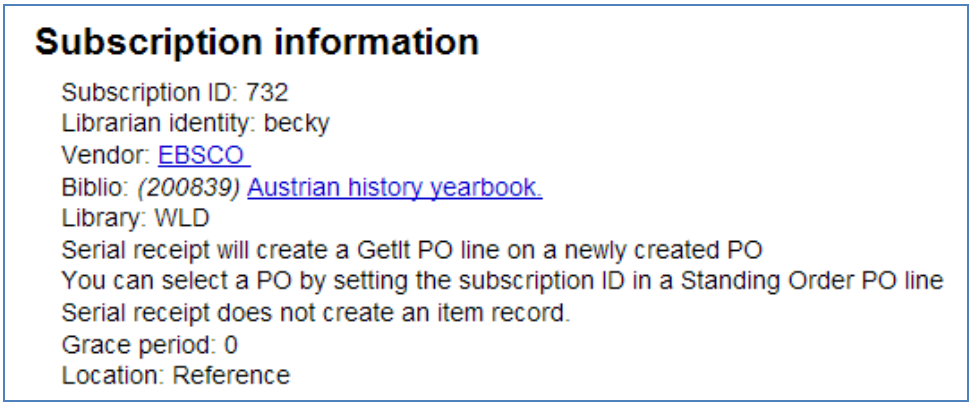
Subscription details
Subscription #
Librarian: becky
Vendor:
Search for a vendor 1 (EBSCO)
Biblio:
Search for Biblio | Create Biblio 200839 (Austrian history yearbook) Required
create a GetIt PO line when receiving this serial
do not create a GetIt PO line when receiving this serial
create an item record when receiving this serial
do not create an item record when receiving this serial

To create a link, click the radio button in front of '*create a PO line when receiving this serial*':


Subscription details
Subscription # 732
Librarian: becky
Vendor:
Search for a vendor 1 (EBSCO)
Biblio:
Search for Biblio | Edit biblio 200839 (Austrian history yearbook) Required
create a GetIt PO line when receiving this serial
A new PO will be created, unless you create or edit a GetIt PO line and set its subscription ID to 732
do not create a GetIt PO line when receiving this serial
create an item record when receiving this serial
do not create an item record when receiving this serial

After you save the subscription record, the subscription record is displayed. In the 'Subscription Information" section, you'll see a reminder to set the subscription record id in a Standing Order PO line.


Subscription information
Subscription ID: 732
Librarian identity: becky
Vendor: EBSCO
Biblio: (200839) Austrian history yearbook.
Library: WLD
Serial receipt will create a GetIt PO line on a newly created PO
You can select a PO by setting the subscription ID in a Standing Order PO line
Serial receipt does not create an item record.
Grace period: 0
Location: Reference

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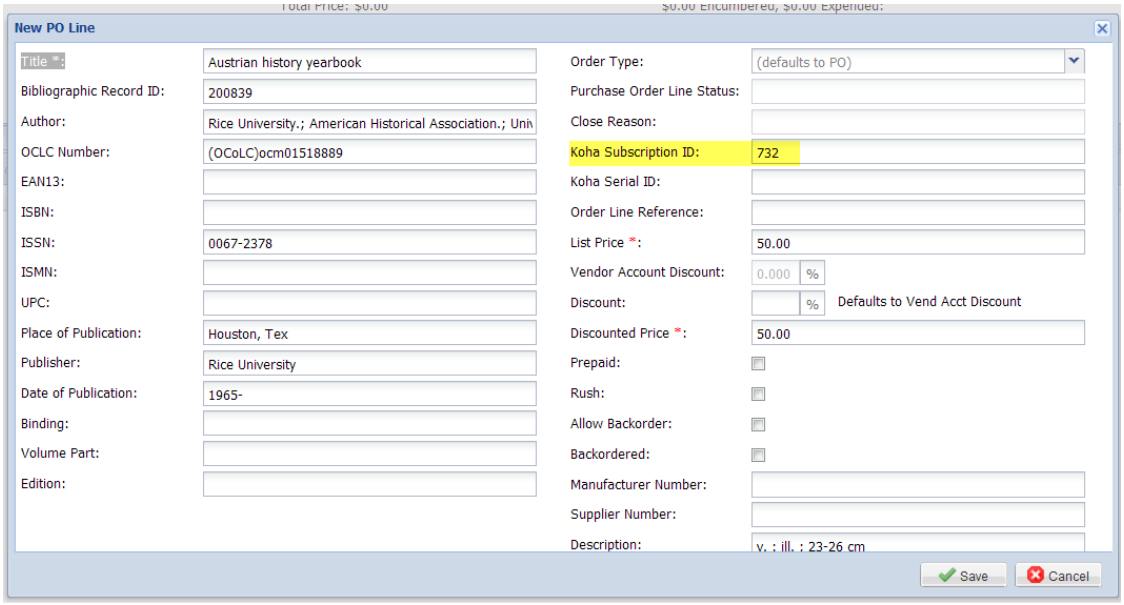
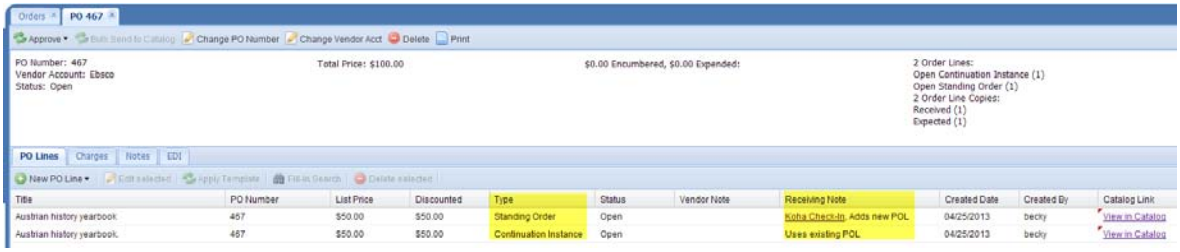
In acquisitions, you will create a new PO for this title. You can also add this title to an existing purchase order. The link back to serials is made by entering the subscription record id in the ***Koha Subscription ID:*** field of the PO Line. Complete the purchase order by adding copy and funding information. (The Koha Serial ID is a read-only field)



When a new issue is received in Serials, a new line item will be added to the purchase order. The final step is to create an invoice and approve payment. The purchase order will include a receiving note tells you that acquisitions will add a new purchase order line each time a new issue is received in serials.



Note that the Type column shows that the order was set up as a standing order, which keeps the purchase order opens until you decide to cancel your subscription. Each issue checked in will create a new purchase order line (POL) with a type of **Continuations**. After you've received several issues, a purchase price history will accumluate.

Also note that the Receiving Note column has a live link to the Koha Check-In for this title. Clicking on the link will open a new window and display the Subscription information for the specific title. Again, the first line shows the order was set up as a standing order which

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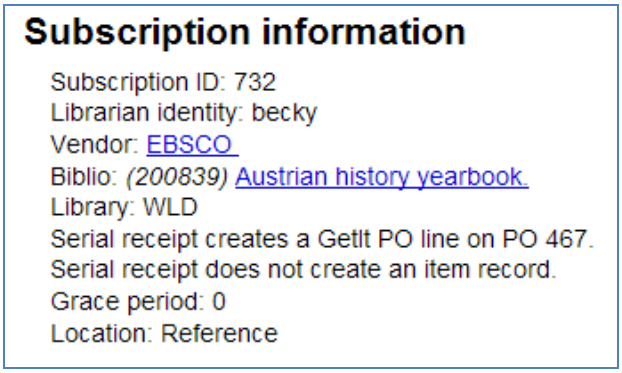
subsequently triggers a new POL, and the second line shows that each receipt will create a new purchase order line.

When the expected issue is received, the subscription record will be updated with the purchase order number:

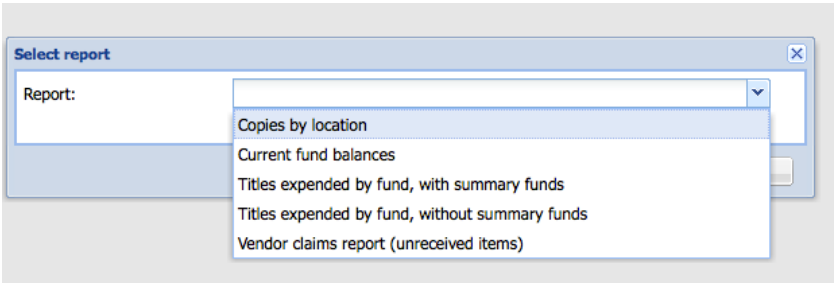

Subscription information
Subscription ID: 732
Librarian identity: becky
Vendor: EBSCO
Biblio: (200839) Austrian history yearbook.
Library: WLD
Serial receipt creates a GetIt PO line on PO 467.
Serial receipt does not create an item record.
Grace period: 0
Location: Reference

13.19 Acquisitions Reports

Several canned reports are available on the main acquisitions page. Reports are links to complex SQL queries that can be run from the interface if the staff person has the appropriate permissions. Report queries, parameters, and column names are stored in SQL tables, so that new reports can be added rapidly (an interface to allow users to build their own reports could be added in the future).

13.19.1 Reports Available

Presently available reports are Copies by Location, Current Fund Balances, Titles by Fund (with or without summary funds) and Vendor Claims:


Select report
Report:
Copies by location
Current fund balances
Titles expended by fund, with summary funds
Titles expended by fund, without summary funds
Vendor claims report (unreceived items)

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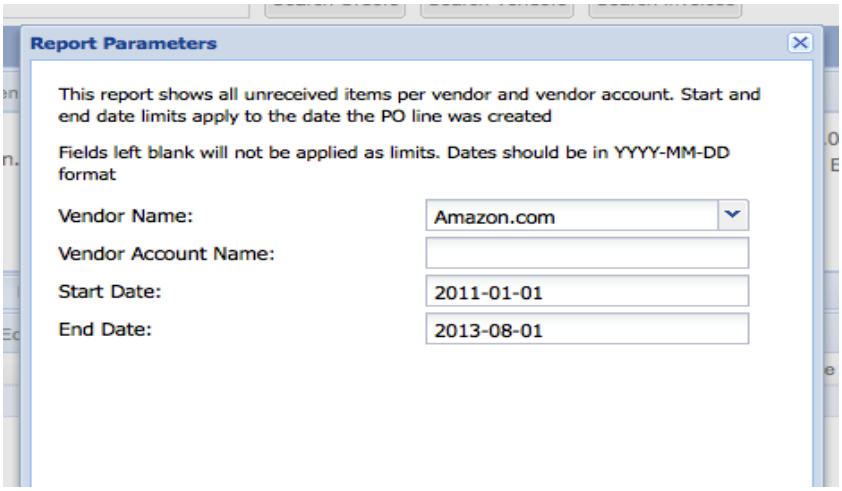
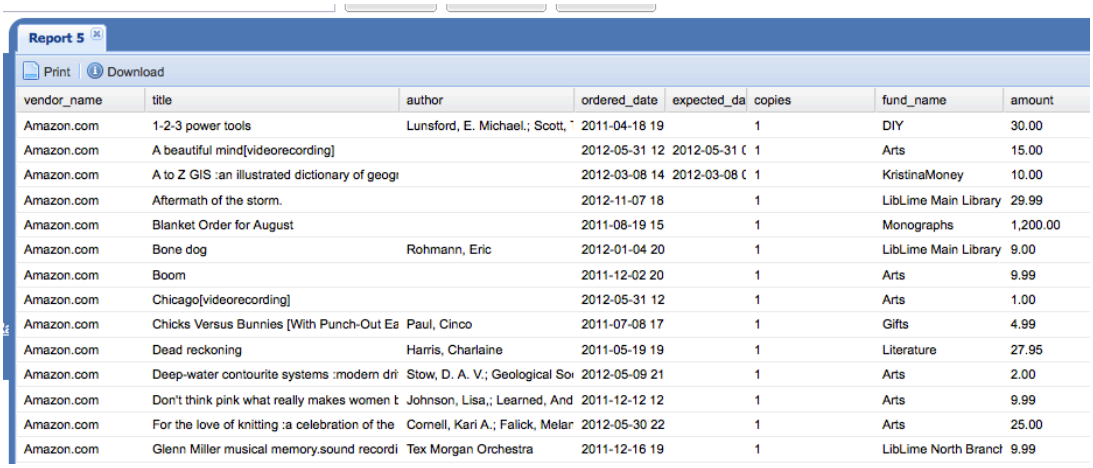
When running a report, you will be prompted to enter several parameters, depending on the type of report. In the example below of a **Vendor Claims Report**, the user is prompted to enter the desired vendor, account number and dates.


Report Parameters
This report shows all unreceived items per vendor and vendor account. Start and end date limits apply to the date the PO line was created
Fields left blank will not be applied as limits. Dates should be in YYYY-MM-DD format
Vendor Name:
Amazon.com
Vendor Account Name:
Start Date:
2011-01-01
End Date:
2013-08-01

NOTE: Dates should always be entered in YYYY-MM-DD format

The report output can be sorted, columns chosen, and then printed or downloaded.



vendor_name	title	author	ordered_date	expected_da	copies	fund_name	amount
Amazon.com	1-2-3 power tools	Lunsford, E. Michael.; Scott,	2011-04-18 19		1	DIY	30.00
Amazon.com	A beautiful mind[videorecording]		2012-05-31 12	2012-05-31 (	1	Arts	15.00
Amazon.com	A to Z GIS :an illustrated dictionary of geogı		2012-03-08 14	2012-03-08 (	1	KristinaMoney	10.00
Amazon.com	Aftermath of the storm.		2012-11-07 18		1	LibLime Main Library	29.99
Amazon.com	Blanket Order for August		2011-08-19 15		1	Monographs	1,200.00
Amazon.com	Bone dog	Rohmann, Eric	2012-01-04 20		1	LibLime Main Library	9.00
Amazon.com	Boom		2011-12-02 20		1	Arts	9.99
Amazon.com	Chicago[videorecording]		2012-05-31 12		1	Arts	1.00
Amazon.com	Chicks Versus Bunnies [With Punch-Out Ea	Paul, Cinco	2011-07-08 17		1	Gifts	4.99
Amazon.com	Dead reckoning	Harris, Charlaine	2011-05-19 19		1	Literature	27.95
Amazon.com	Deep-water contourite systems :modern dri	Stow, D. A. V.; Geological So	2012-05-09 21		1	Arts	2.00
Amazon.com	Don't think pink what really makes women b	Johnson, Lisa,; Learned, And	2011-12-12 12		1	Arts	9.99
Amazon.com	For the love of knitting :a celebration of the	Cornell, Kari A.; Falick, Melar	2012-05-30 22		1	Arts	25.00
Amazon.com	Glenn Miller musical memory.sound recordi	Tex Morgan Orchestra	2011-12-16 19		1	LibLime North Brancl	9.99

14. Serials

The Serials module allows libraries to receive magazine/journal issues. If the library chooses, it is possible to barcode each issue so that issues may be checked out via circulation. It is possible

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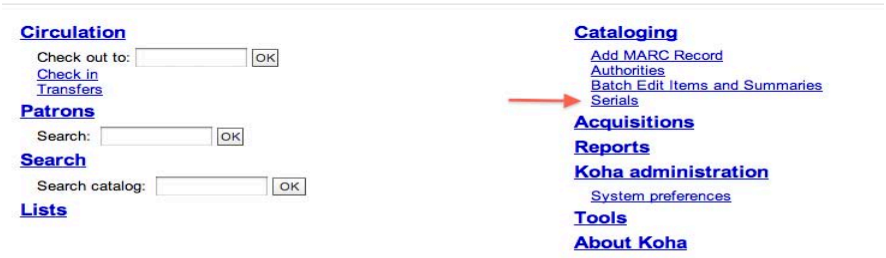
to display magazine holdings in the Discovery Layer and allow patrons to place copy-specific holds on issues. It is also possible to print spine labels for magazines that will include volume information. If a library chooses, they may use Acquisitions to generate claims notices to vendors for damaged issues, or issues not received.

A link to the Serials module appears on the main staff menu:



In working with Serials, it is important to understand record structure. Five key pieces of functionality are equated with Serials control:

1. Bibliographic Record *
2. Subscription Record *
3. Summary Record
4. Issue Records
5. Item Records

The first two are required while the rest are optional.

A **MARC Bibliographic Record** is required prior to using Serials. It can be very brief.

The **Subscription Record** stores information about a magazine's publication pattern. Publication patterns control the prediction for subscription checkin. For example, if a magazine uses volume numbers, copy numbers and is a monthly publication, the periodical record will include all of this information. When the first issue of a magazine title is checked in on the system, the system prompts for the proper information. The system then predicts all future issues based on the information entered in the periodical record.

Summary Records allow the display of staff-entered free–text information in the Discovery Layer; for example, "Library retains current year only" or "Current issue on shelf. Later issues kept in basement".

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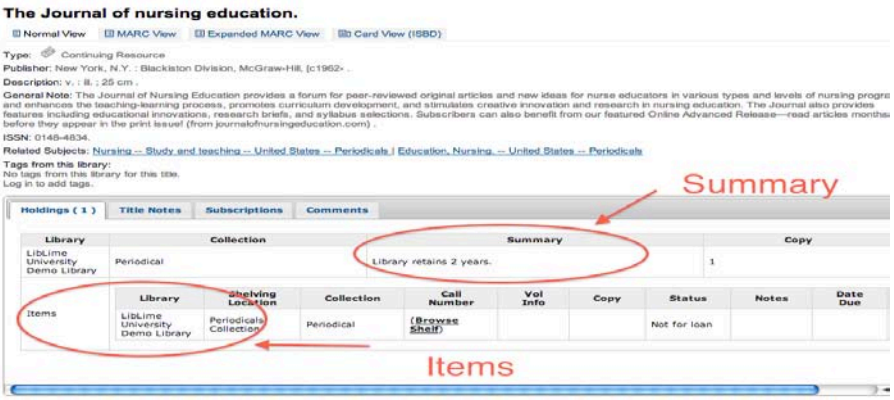
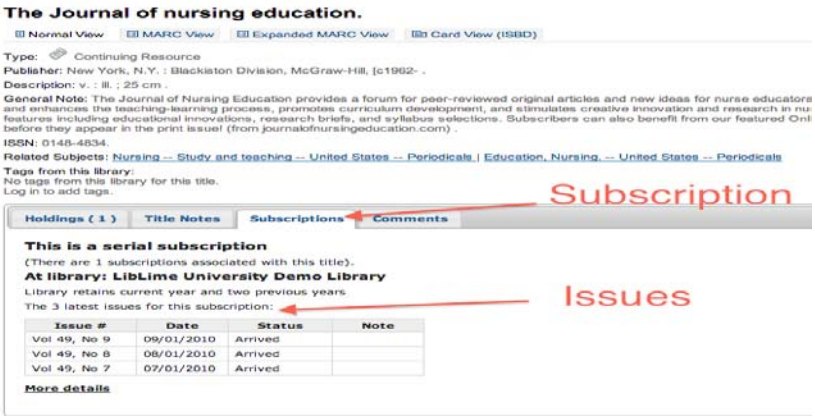
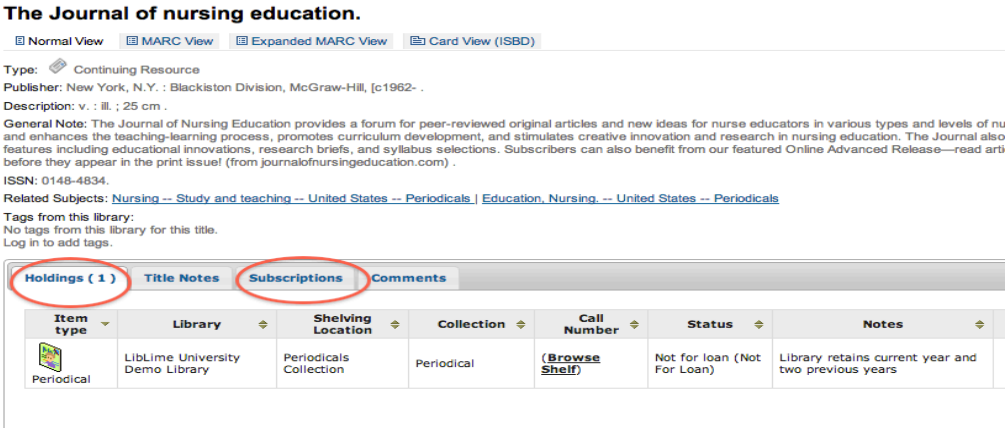


Issue Records reflect the individual physical piece – for example, the May issue of *Consumer Reports*:



Item Records are optional and are used to circulate individual issues to patrons through the Circulation functionality.



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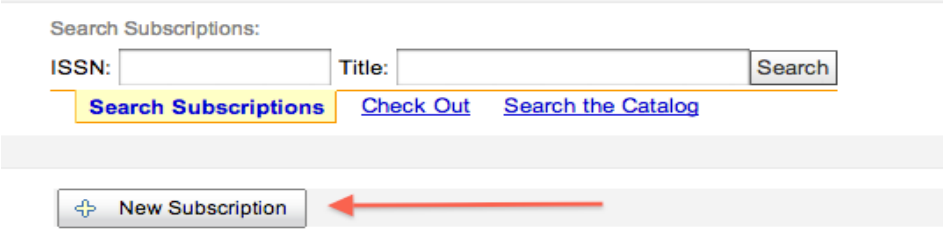
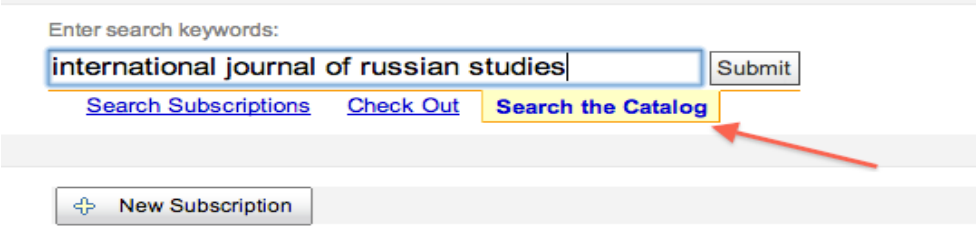
14.1 Creating a Subscription Record

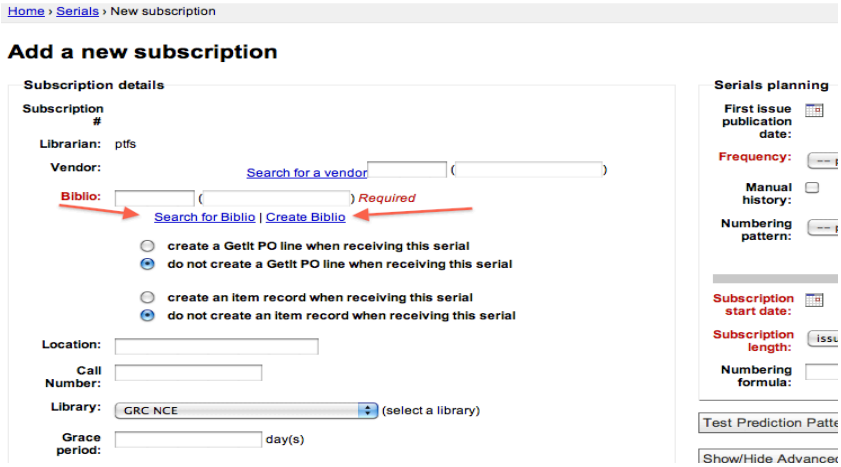
The process of Serials control begins with a MARC bibliographic record. From the main menu, select the **Serials** link to launch Serials. Then search for the MARC record you want by clicking the **New Subscription** button



Or, use the **Search the Catalog** link for exact searching:



A MARC record must already exist in order to use Serials. If there is not one in the database, you have the option of creating one when the **New Subscription** button is activated; otherwise, the **Search for Biblio** option will allow you to search for the record and attach to the new subscription record:



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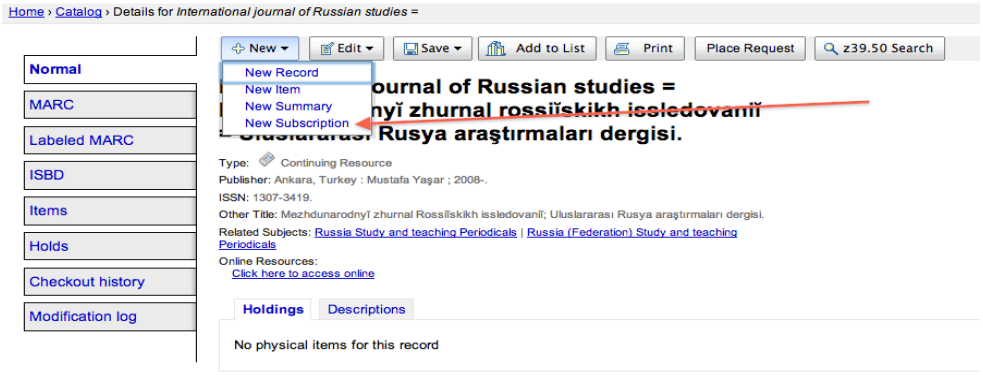
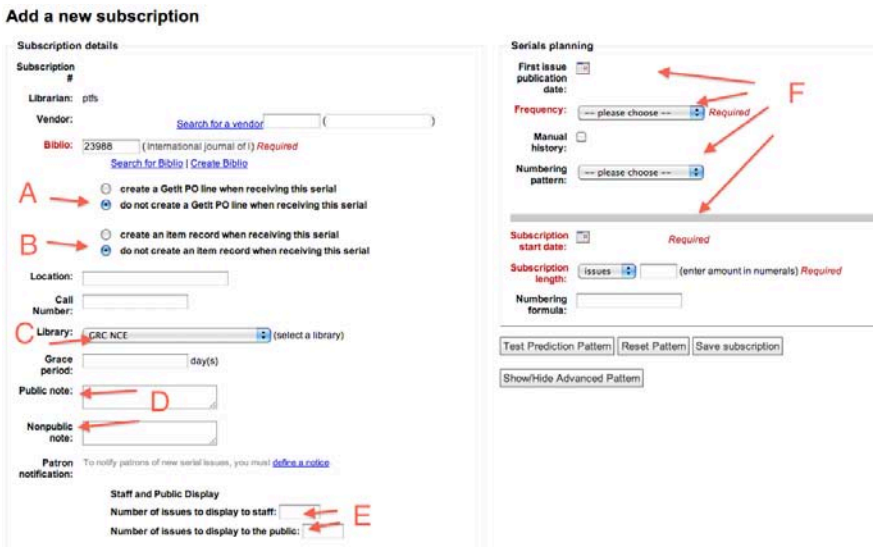
When displaying a bibliographic record, the **New**, **New Subscription** button allows creation of a subscription record:



The Subscription record contains fields for

A: whether to link with the Acquisitions system **B:** whether to create item records upon receipt, **C:** which library this subscription is for, **D:** Public display (Discovery Layer) and Staff display notes, **E:** number of checked in issues to display in Discovery Layer and Staff interface, and **F:** Serials Planning information regarding date of first issue to predict, frequency, numbering pattern, and subscription length:


Add a new subscription
Subscription details
Subscription #
Librarian: ptfs
Vendor:
Search for a vendor
Biblio: 23988 (International journal of I) Required
Search for Biblio | Create Biblio
A
create a GetIt PO line when receiving this serial
do not create a GetIt PO line when receiving this serial
B
create an item record when receiving this serial
do not create an item record when receiving this serial
Location:
Call Number:
C
Library: GRC NCE (select a library)
Grace period: day(s)
Public note:
D
Nonpublic note:
Patron notification:
To notify patrons of new serial issues, you must define a notice
Staff and Public Display
Number of issues to display to staff:
Number of issues to display to the public:
E
Serials planning
First issue publication date:
Frequency: -- please choose -- Required
F
Manual history:
Numbering pattern: -- please choose --
Subscription start date: Required
Subscription length: issues (enter amount in numerals) Required
Numbering formula:
Test Prediction Pattern
Reset Pattern
Save subscription
Show/Hide Advanced Pattern

A completed subscription might look something like the following screen capture. The **Test Prediction** button allows a preview of the pattern's rollover (and is required prior to saving):

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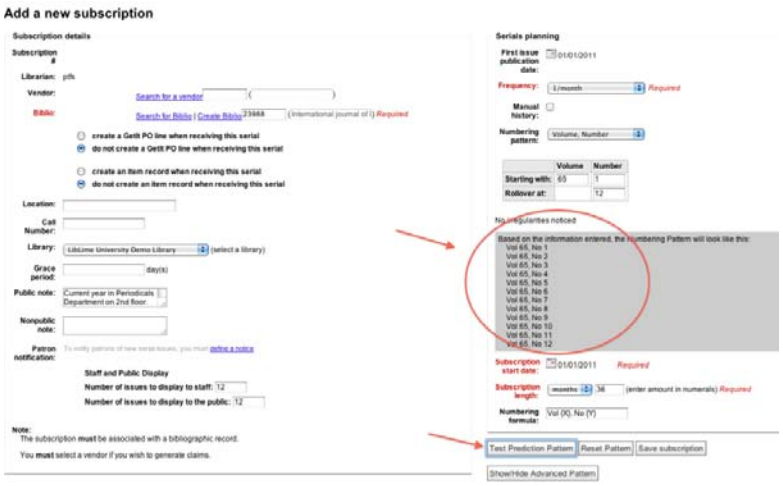

Vendor, though not required, will produce a pop-up warning that can be by-passed by clicking **OK:**

The page at [redacted] says:
If you wish to claim late or missing issues you must link this subscription to a vendor. Click OK to ignore or Cancel to return and enter a vendor
Cancel
OK

After saving the subscription, the completed record will display:

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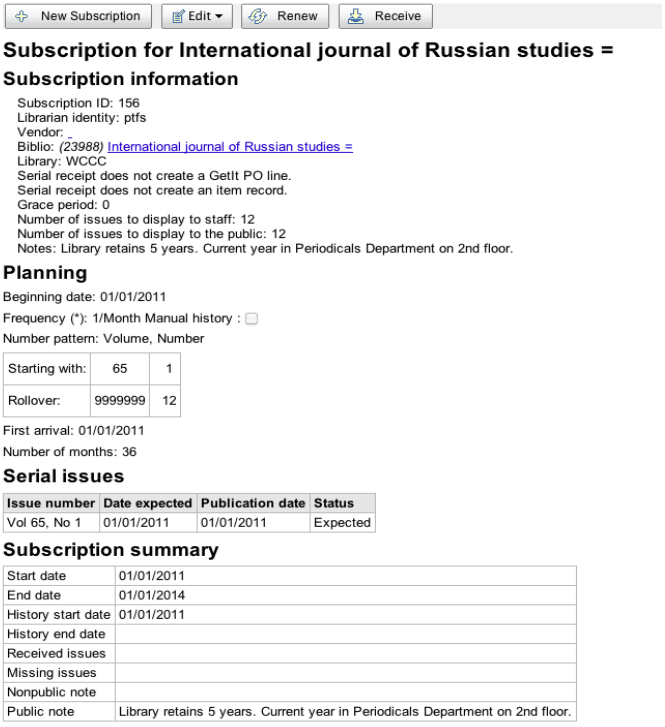
New Subscription
Edit
Renew
Receive
Subscription for International journal of Russian studies =
Subscription information
Subscription ID: 156
Librarian identity: ptfs
Vendor:
Biblio: (23988) International journal of Russian studies =
Library: WCCC
Serial receipt does not create a GetIt PO line.
Serial receipt does not create an item record.
Grace period: 0
Number of issues to display to staff: 12
Number of issues to display to the public: 12
Notes: Library retains 5 years. Current year in Periodicals Department on 2nd floor.
Planning
Beginning date: 01/01/2011
Frequency (*): 1/Month Manual history :
Number pattern: Volume, Number
Starting with: 65 1
Rollover: 9999999 12
First arrival: 01/01/2011
Number of months: 36
Serial issues
Issue number Date expected Publication date Status
Vol 65, No 1 01/01/2011 01/01/2011 Expected
Subscription summary
Start date 01/01/2011
End date 01/01/2014
History start date 01/01/2011
History end date
Received issues
Missing issues
Nonpublic note
Public note Library retains 5 years. Current year in Periodicals Department on 2nd floor.

14.2 Receiving Issues

Receipt of newly arrived serial issues can be done immediately after creating a **Subscription** record by clicking the **Receive** button:

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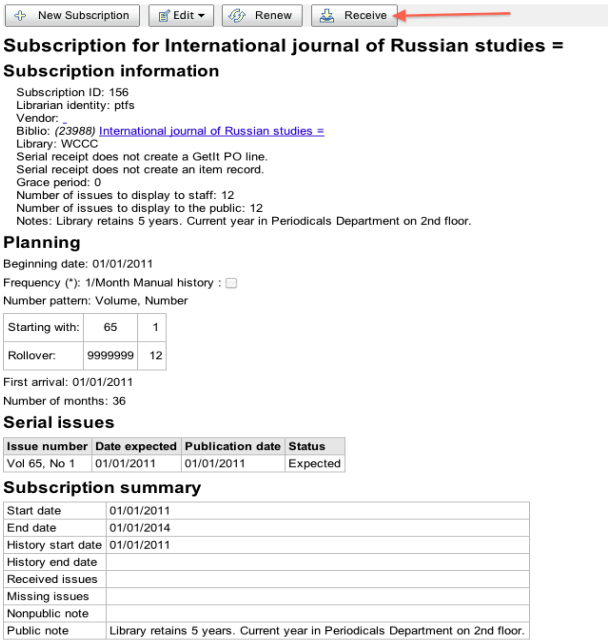
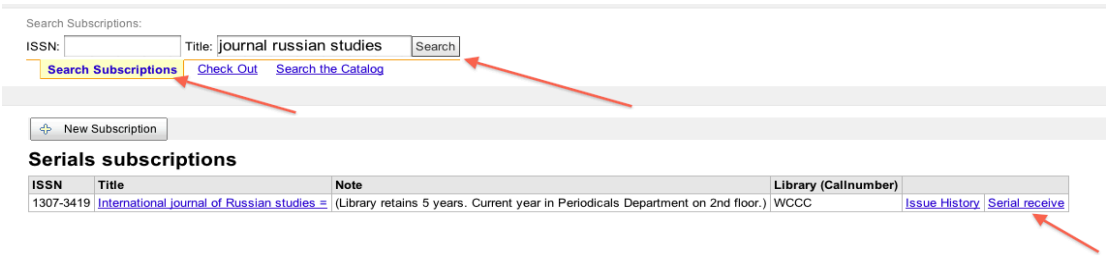
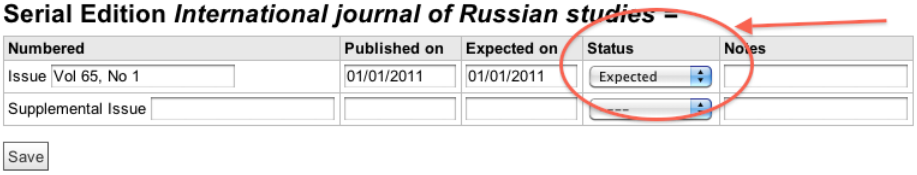

New Subscription
Edit
Renew
Receive
Subscription for International journal of Russian studies =
Subscription information
Subscription ID: 156
Librarian identity: ptfs
Vendor:
Biblio: (23988) International journal of Russian studies =
Library: WCCC
Serial receipt does not create a GetIt PO line.
Serial receipt does not create an item record.
Grace period: 0
Number of issues to display to staff: 12
Number of issues to display to the public: 12
Notes: Library retains 5 years. Current year in Periodicals Department on 2nd floor.
Planning
Beginning date: 01/01/2011
Frequency (*): 1/Month Manual history :
Number pattern: Volume, Number
Starting with: 65 1
Rollover: 9999999 12
First arrival: 01/01/2011
Number of months: 36
Serial issues
Issue number Date expected Publication date Status
Vol 65, No 1 01/01/2011 01/01/2011 Expected
Subscription summary
Start date 01/01/2011
End date 01/01/2014
History start date 01/01/2011
History end date
Received issues
Missing issues
Nonpublic note
Public note Library retains 5 years. Current year in Periodicals Department on 2nd floor.

Or, by searching for the Subscription and clicking the **Serial receive** link on the right of the subscription:


Search Subscriptions:
ISSN:
Title: journal russian studies
Search
Search Subscriptions
Check Out
Search the Catalog
New Subscription
Serials subscriptions
ISSN Title Note Library (Callnumber)
1307-3419 International journal of Russian studies = (Library retains 5 years. Current year in Periodicals Department on 2nd floor.) WCCC Issue History Serial receive

Clicking the **Receive** button will display the checkin window with a **Status** drop-down box to allow change of status from Expected to Arrived (with other statuses of Late, Missing, Claimed, Not available):



Checkin of new issues is immediately reflected in the Discovery Layer:

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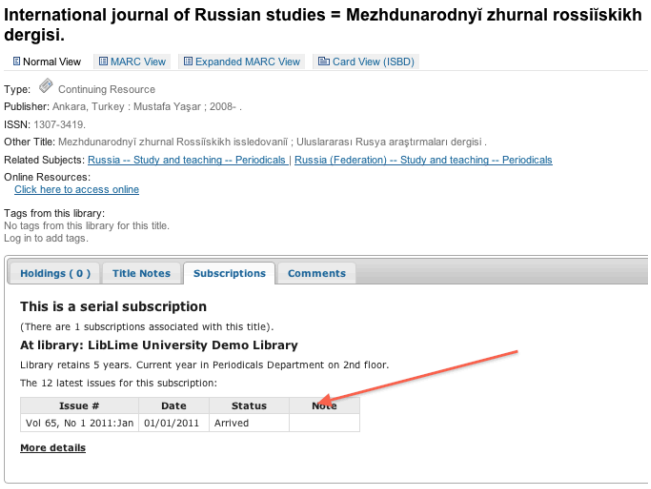
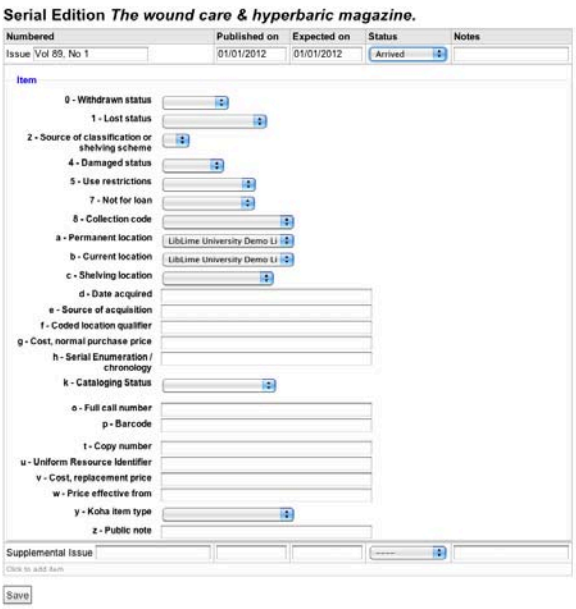

International journal of Russian studies = Mezhdunarodnyï zhurnal rossiïskikh dergisi.
Normal View
MARC View
Expanded MARC View
Card View (ISBD)
Type: Continuing Resource
Publisher: Ankara, Turkey : Mustafa Yaşar ; 2008- .
ISSN: 1307-3419.
Other Title: Mezhdunarodnyï zhurnal Rossiïskikh issledovaniĭ ; Uluslararası Rusya araştırmaları dergisi .
Related Subjects: Russia -- Study and teaching -- Periodicals | Russia (Federation) -- Study and teaching -- Periodicals
Online Resources:
Click here to access online
Tags from this library:
No tags from this library for this title.
Log in to add tags.
Holdings (0)
Title Notes
Subscriptions
Comments
This is a serial subscription
(There are 1 subscriptions associated with this title).
At library: LibLime University Demo Library
Library retains 5 years. Current year in Periodicals Department on 2nd floor.
The 12 latest issues for this subscription:
Issue #
Date
Status
Note
Vol 65, No 1 2011:Jan
01/01/2011
Arrived
More details

If the decision was made to create Item (holding) records for this title, the **Add Item** window will appear immediately after marking an issue as Arrived:



Saving of item records is immediately reflected in the Discovery Layer:

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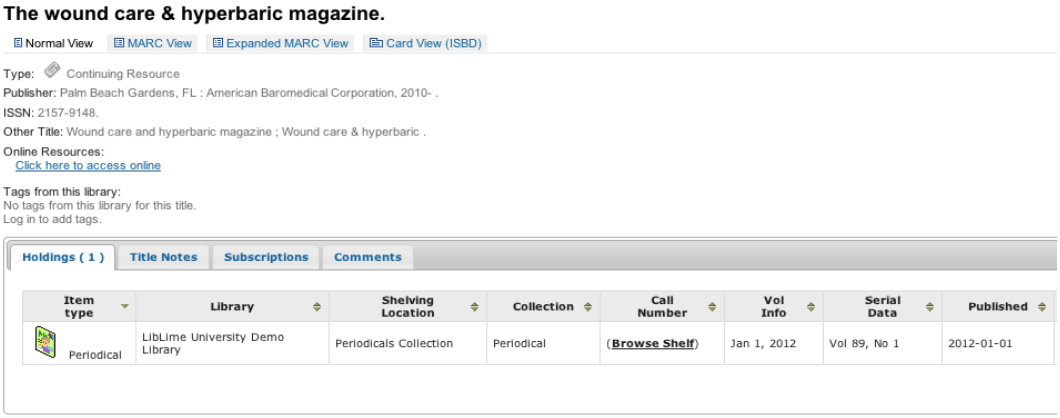
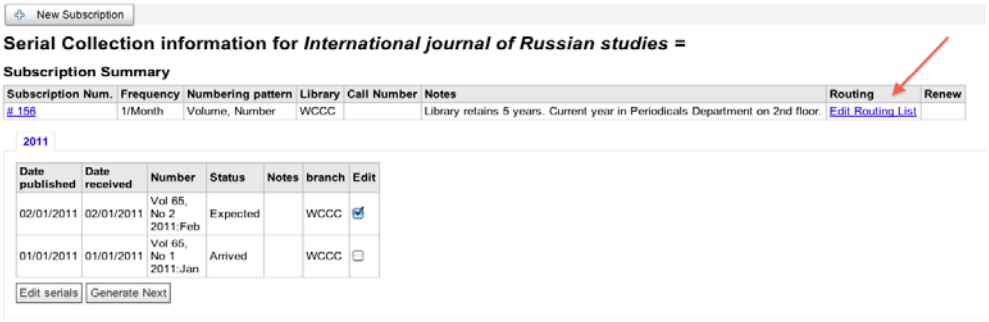
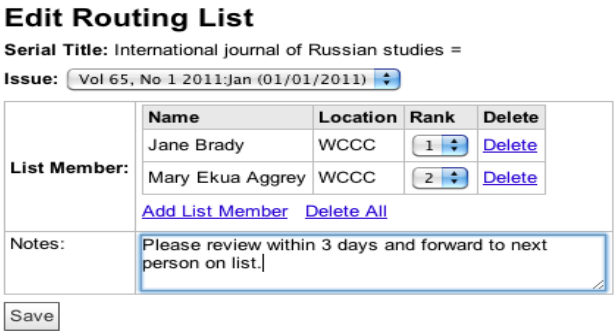


14.3 Routing Slips

Routing slips allow newly received issues to be distributed to specified library staff members:



Staff members are added to the Routing List using the **Add List Member** link:



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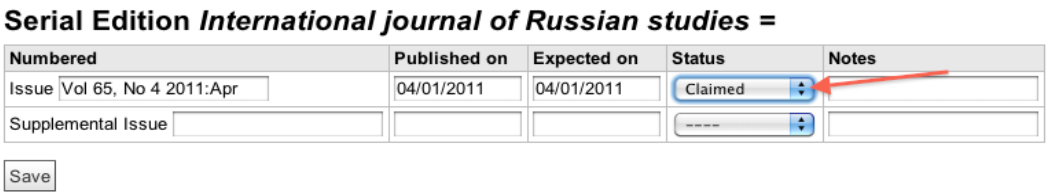
14.4 Claiming

The **Serials receive** window allows staff to mark unreceived issues with a Claimed status:



Claim letters can be printed by clicking the **Claims** link on the Serials menu:

Claim notices are defined in Tools, Notices and can be edited as needed.

15. Lists

The list function allows users to create lists items that may or may be shared with other users. It is available in both staff and the OPAC. Lists may be public, private or open.

- A private list is created, managed and seen only by the person who created it;
- A public list is seen by everyone but managed only by the person who created it;
- An open list can be seen and managed by everyone. This can become unwieldy or unmanageable and is not recommended.

To create and manage lists in the staff mode, select Lists from the home page menu:

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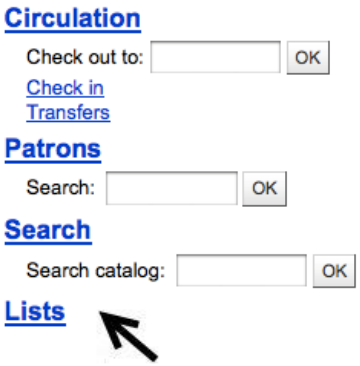

No special staff permissions are required to manage lists. When you select Lists from the home page you are taken to a display of your current private and public lists:

From here, you can create a new list, edit an existing list, or delete a list.

To add a new list, click on the button New List. This will bring up a template for the new list details. This includes a name for the list, how it will sort, and whether it is Private, Public or Open.

New List
Create a new List
Name:
Owner: ptfs
Sort this list by:
Title
Category:
Private
Save
Cancel
A Private List is managed by you and can be seen only by you.
A Public List can be seen by everybody, but managed only by you.
A Open List can be seen and managed by everybody.

Click Save when you are done. When the template is saved, you are taken to a screen where items can be added to the list. To add the items, scan in the barcode and click "Add."

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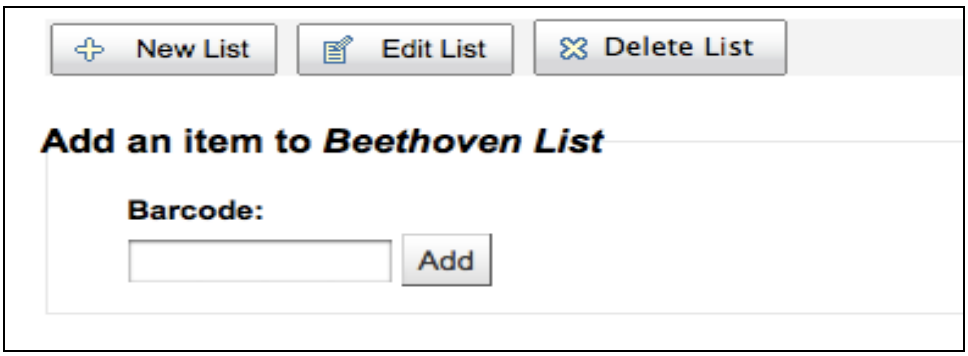
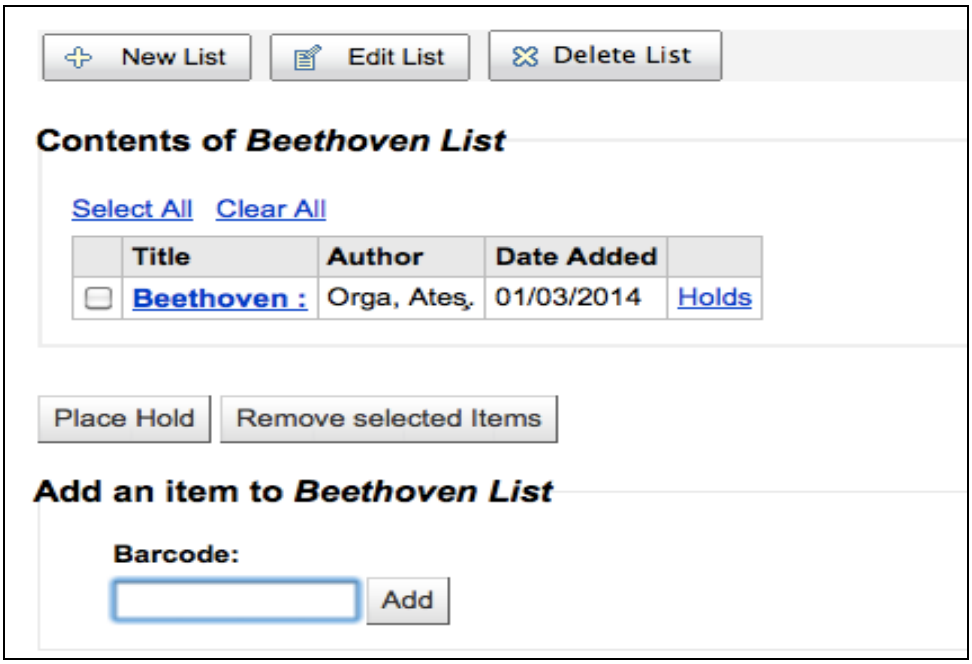


After an item is scanned it appears in the list:



You may continue to add as many items as needed from this point. Note also that once items are added to the list they are available for placing a Hold through the list.

Clicking on the Edit button of the list takes you back to the set-up parameters, which allows you to change the name of the list, how it is sorted or whether it is Private or Public.

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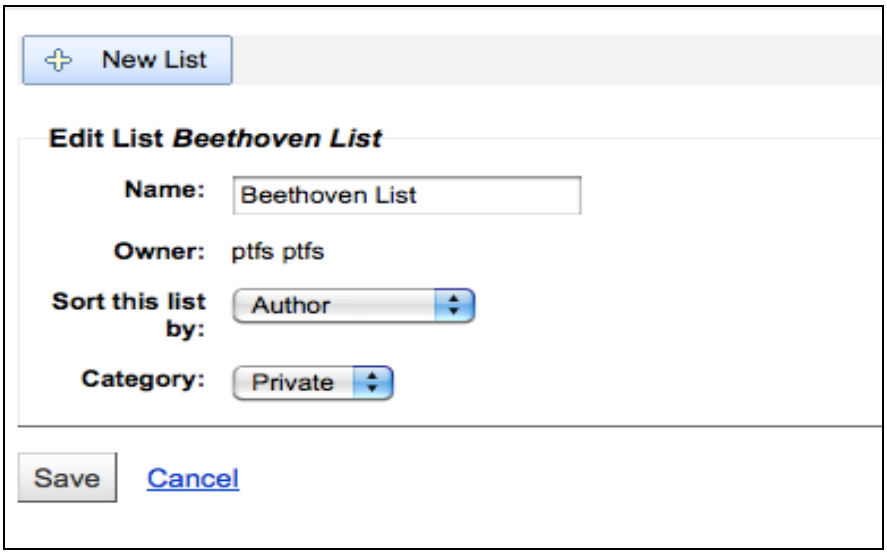

You may also Delete a list from the staff mode. If you click on Delete, you will be asked to confirm the action. If you agree to the Delete action, but there are items in the list, you will be asked for further confirmation:

The list will not be deleted until you Confirm; once deleted it cannot be retrieved.

See the Discovery Layer section for information about working with lists in the public interface.

16. Moderating

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16.1 Moderating Tags

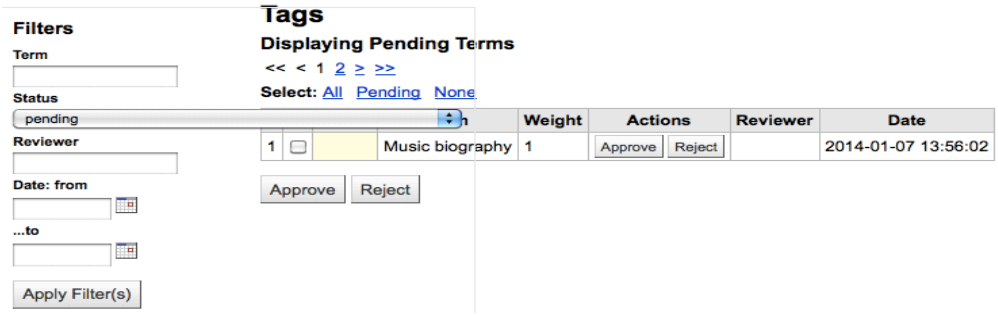
Tags are added by users in the OPAC, and can be moderated by staff, if enabled (syspref TagsEnabled). When a patron adds a new tag it is subject to moderation by staff (if TagsModeration syspref is enabled). We strongly recommend that library staff moderate tags.

To check and approve newly-added tags to go Tools, Tags:

From this screen you can:

- Search for terms that are pending, approved, or rejected;
- Filter tags by Searches, by Reviewer, or a date range;
- Test a term against the Test Blacklist, which is a whitelist/blacklist of terms;
- See a summary of all terms currently moderated; click on the link to see the terms under each category.

New tags appear in the list of Pending terms, where they can be Approved or Rejected:



If Approved, the tag will be added to the Tag Cloud, where it can be used for searching by any patron. It will also be added to the Test Blacklist. Searching against this test will tell if you a tag is permitted, prohibited, or has not yet been moderated. For example, an approved tag gives the following information:

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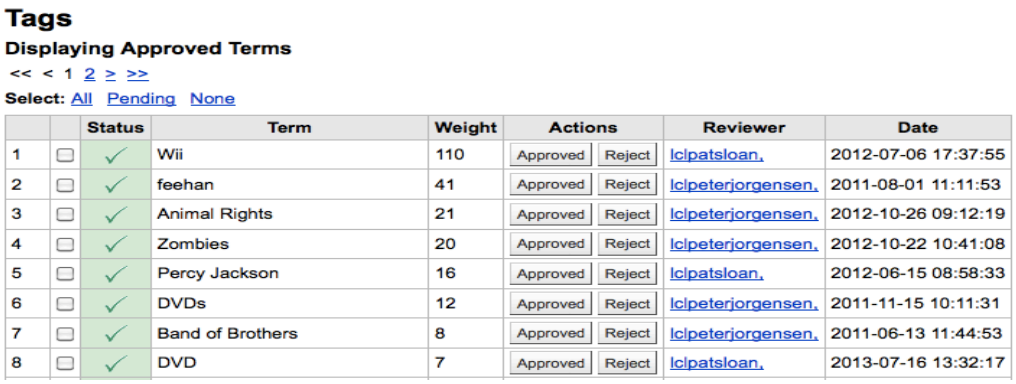
Test Blacklist
Enter a word or phrase here to test against your whitelist/blacklist:
animal rights
test
animal rights is permitted!

Note also that from this screen you can retrieve a list of all tags that have been moderated to date and revise the original decision—Approve and Reject buttons exist alongside each tag that has already been handled:



		Status	Term	Weight	Actions	Reviewer	Date
1	☐	✓	Wii	110	Approved Reject	lclpatsloan,	2012-07-06 17:37:55
2	☐	✓	feehan	41	Approved Reject	lclpeterjorgensen,	2011-08-01 11:11:53
3	☐	✓	Animal Rights	21	Approved Reject	lclpeterjorgensen,	2012-10-26 09:12:19
4	☐	✓	Zombies	20	Approved Reject	lclpeterjorgensen,	2012-10-22 10:41:08
5	☐	✓	Percy Jackson	16	Approved Reject	lclpatsloan,	2012-06-15 08:58:33
6	☐	✓	DVDs	12	Approved Reject	lclpeterjorgensen,	2011-11-15 10:11:31
7	☐	✓	Band of Brothers	8	Approved Reject	lclpeterjorgensen,	2011-06-13 11:44:53
8	☐	✓	DVD	7	Approved Reject	lclpatsloan,	2013-07-16 13:32:17

16.2 Moderating Comments

The DLS allows users to write comments or reviews about items held by the library. These comments are available for others to read. If enabled (syspref reviewson), a tab labeled Comments appears in the bibliographic display in the OPAC. Patrons must be logged in to submit comments.

Comments are moderated by staff before they are made public. Staff must have the moderate_comments granular permission to moderate comments.

Comments are moderated in Tools, Comments. All pending comments will be listed here, awaiting action. Information on the patron commenting, the title of the item, and the comment are included here.

Click on Approve or Delete to take action on the comment:

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Comments

Commenter	On Title	Comment	
ptfs, ptfs	Classical music :	Good concise history of music.	Approve | Delete
ptfs, ptfs	The New Grove Bach family /	Very useful guide to the Bach clan.	Approve | Delete
ptfs, ptfs	Reading Stephen King :	Provides valuable insights into Kings work.	Approve | Delete

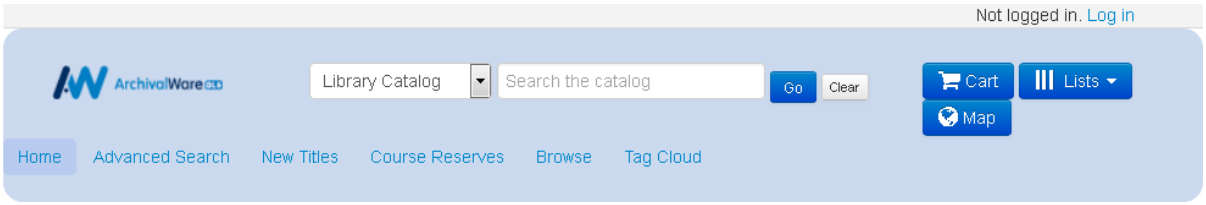
Once a comment is approved or deleted it cannot be retrieved or changed.

17. Using the Discovery Layer

The Discovery Layer is the patron interface to the catalog (the OPAC). Patrons can search, place holds, renew items and see information about their account.

17.1 Home Page

The home page is the main entry point to the Discovery Layer. The masthead bar contains a search box and links to several options. In the upper right corner is a link to log in.



The options available from the masthead depend on how your system is configured. The Cart, Lists, and Map buttons are controlled by system preferences and initial setup. The Cart allows users to collect titles for emailing or downloading. Lists are predefined groups of titles (created either by library staff or by the user). The Map button allows searching and display by map coordinates.

New Titles is a list of titles added to the catalog in the last X days (specified in the syspref NewTitlesAge). Course Reserves is the patron interface to the course reserves module. Browse allows browsing by authorized terms (author, subject, uniform title). Tag Cloud shows tags that

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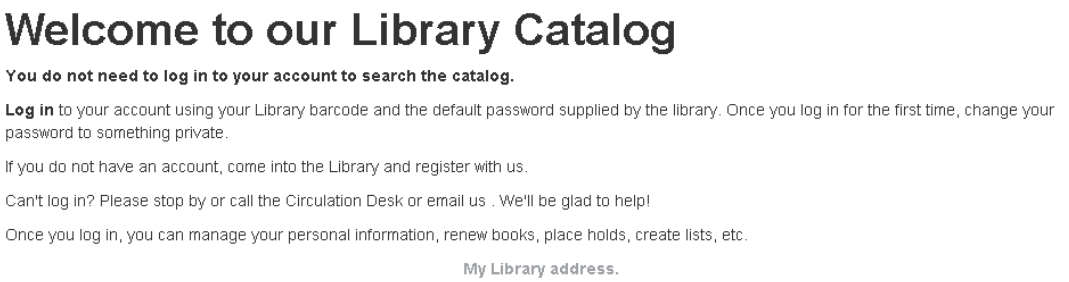
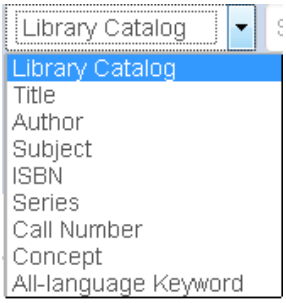
have been applied by all users to records in the system. If enabled and the patron has permission, Add Content will allow upload of digital objects. Any or all of these can be disabled.

The middle of the page may include news items, informational text, search tips, links to library and other resources, and contact information.


Welcome to our Library Catalog
You do not need to log in to your account to search the catalog.
Log in to your account using your Library barcode and the default password supplied by the library. Once you log in for the first time, change your password to something private.
If you do not have an account, come into the Library and register with us.
Can't log in? Please stop by or call the Circulation Desk or email us . We'll be glad to help!
Once you log in, you can manage your personal information, renew books, place holds, create lists, etc.
My Library address.

17.2 Simple Search

The masthead has a search box; you can select from certain indexes, enter a term, and click Go to perform a search. The default Library Catalog is a keyword search – every field in the MARC record is included.



Because the keyword index is so broad, users will probably get better results by choosing an index more suited to what is being searched.

17.3 Advanced Search

The Advanced Search page offers more options for focusing a search, depending on how your system is configured. System administrators can configure additional indexes to be added to the search pull-down box. Users can also select specific item types, collection codes, shelving

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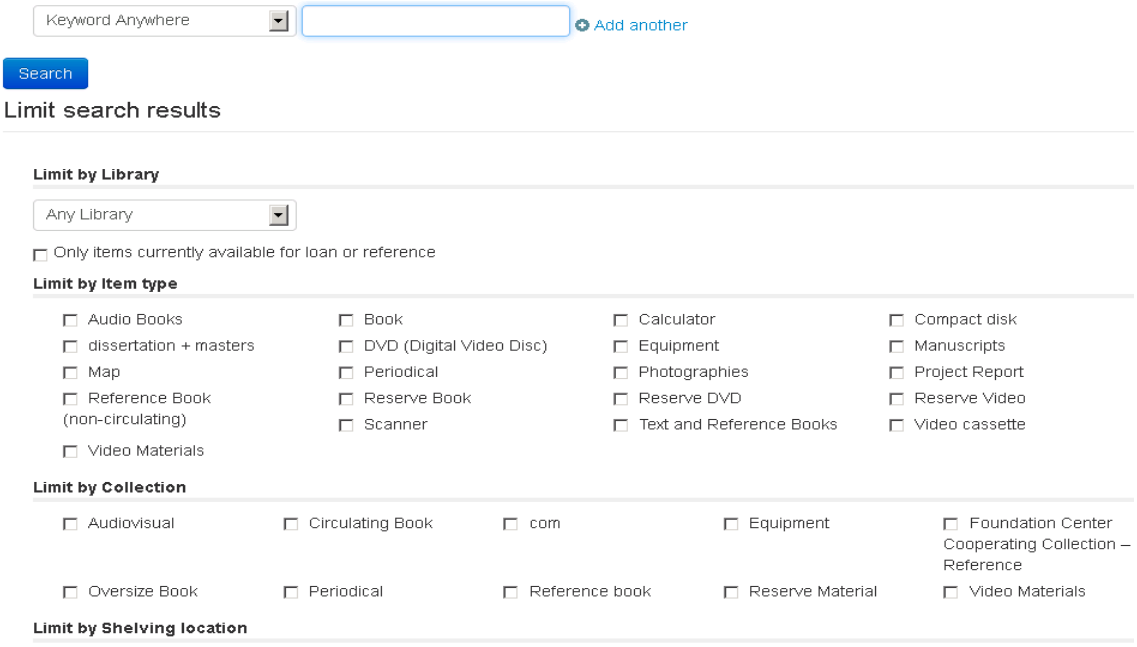
locations, languages, target audience, publication date, musical instrumentation, and owning library.



See the section on searching earlier in the User Manual for additional options and search tips.

17.4 Results List

From either basic or advanced search, you'll be taken to a results list. The screen will show the search strategy used, titles, and information about item availability. If you used more than one setting in your search, you'll see an X next to your limiters; you can remove that limitation and redo the search if desired.

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At the left side, you'll see facets for narrowing your search. Depending on your site's configuration, these can include availability, format (based on the MARC fixed fields), author, subject, language, geographic region, publication date, item type, and collection code. Clicking on any entry from the facet will narrow the existing search.

From links on the results list, you can individually add titles to a cart or list or place a hold. You can also use the checkboxes next to each title to select multiple entries, then use the Action pull-down at the top.

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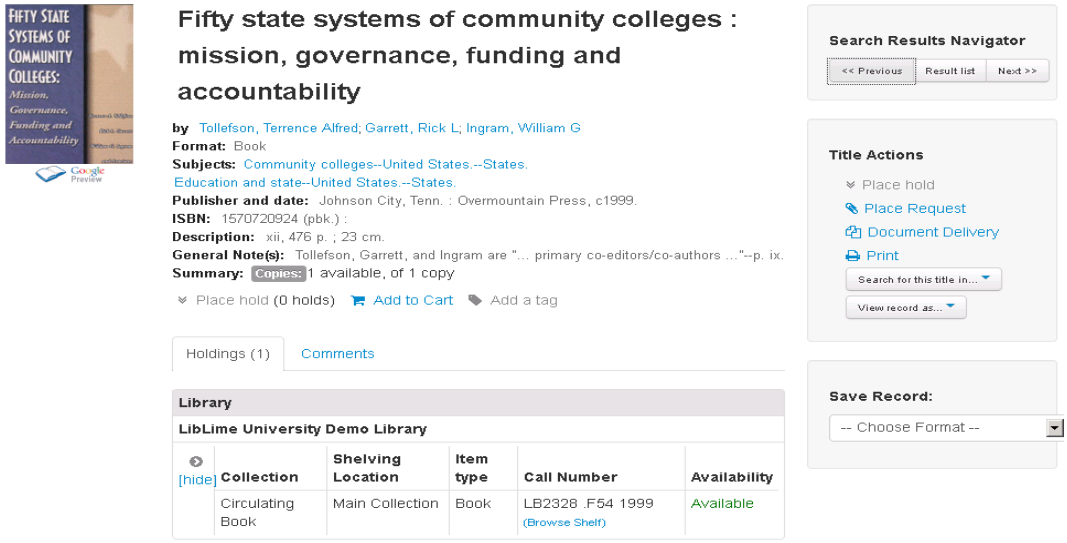
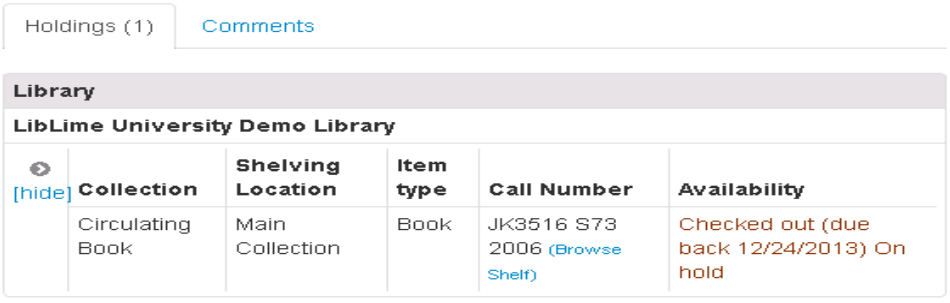
17.5 Title Display

Clicking on a title from the results list will bring up the title display screen. Here you will see information about the title and about items attached to that title.



There are also links to place holds and requests, move through the results list, view or save the record in other formats, and send a search for this title to other resources such as WorldCat or Google Scholar. Some options will be disabled until you log into your account.

The bottom part of the display gives details about the item records – shelving location, call number, availability, etc. The display can show if an item is checked out, on hold, damaged, or lost.



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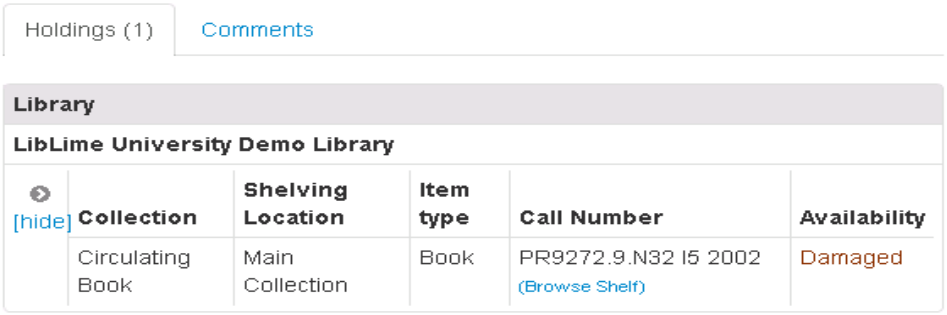
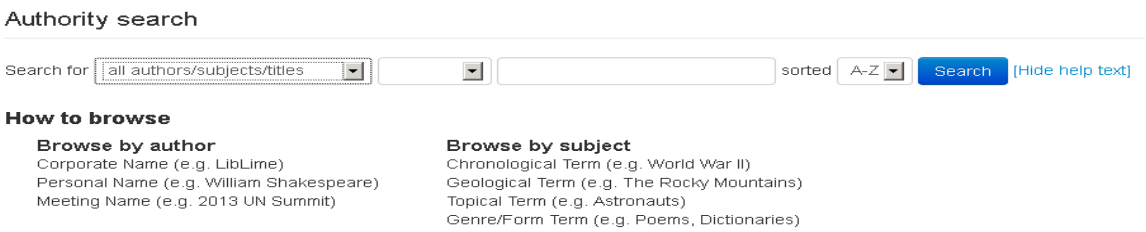
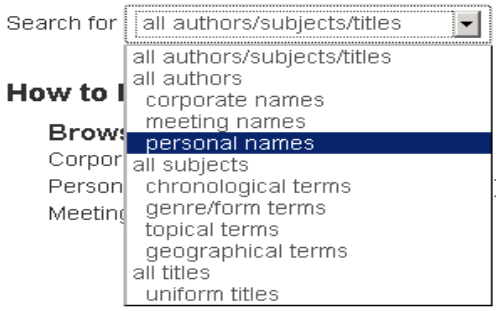


17.6 Authority Browse

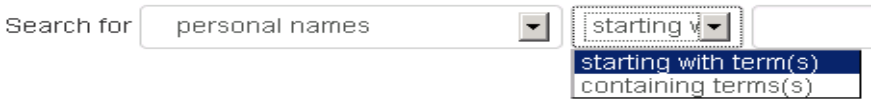
If enabled, the Browse link in the masthead will allow users to browse for titles related by an authorized term (author, subject, uniform title).



Use the pull-down to select the appropriate authority index; the default will search all indexes:



The second box on the search line allows you to specify whether the record's entry should start with the specified term, or just contain it somewhere in the entry:



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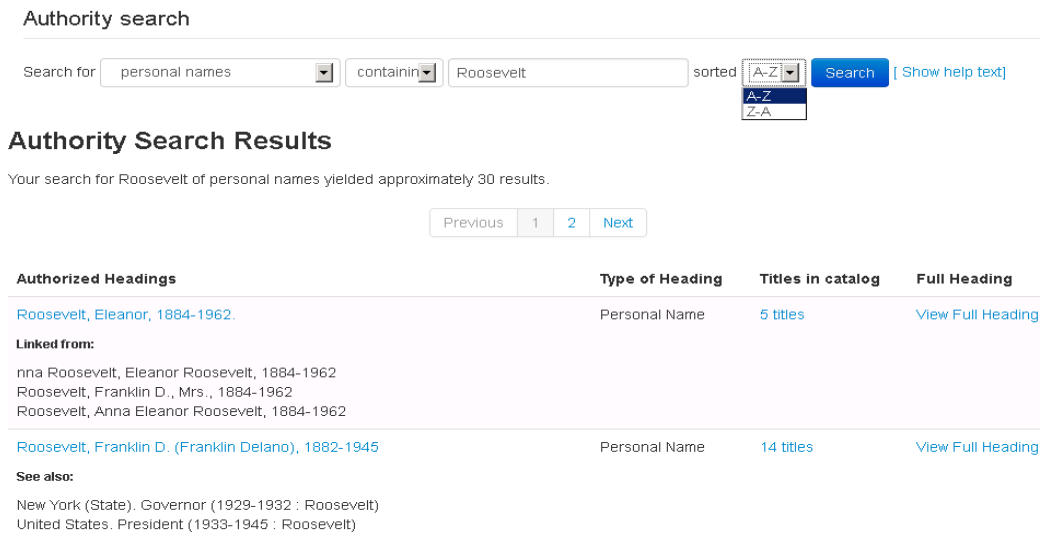
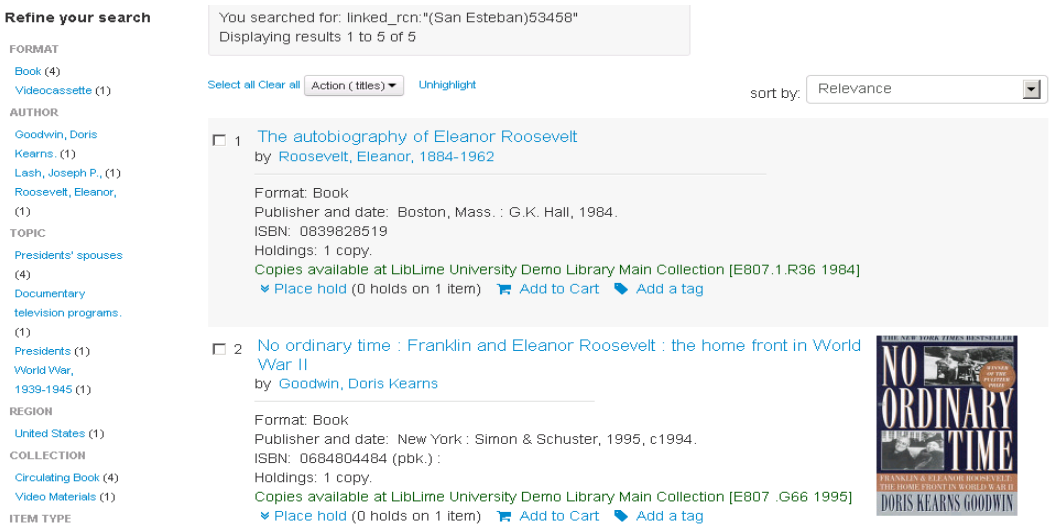
The third box is where you enter a search term; the last box lets you change the sort order. Make your selections and click Search.



The results list will show you the authority record entries and how many times they are used in the catalog. The View Full Heading link will pop up a window with the full MARC authority record. Clicking on either the heading entry itself or the link under Titles in Catalog will bring up a search results page with the titles that use the heading:



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17.7 New Titles

The New Titles feature allows sites to easily feature new material. It is a list of titles added to the catalog in the last X days (number of days specified in the syspref NewTitlesAge). The feature uses only new title records, not new items added to existing titles.

17.8 Cart

The Cart is a holding place for a collection of records. (Note that sites can change the name from Cart to something else, like Bookbag.) When you have added items to the cart, the masthead display will change to show a count:

Clicking on the Cart button in the masthead will open a popup window with the contents of your cart.

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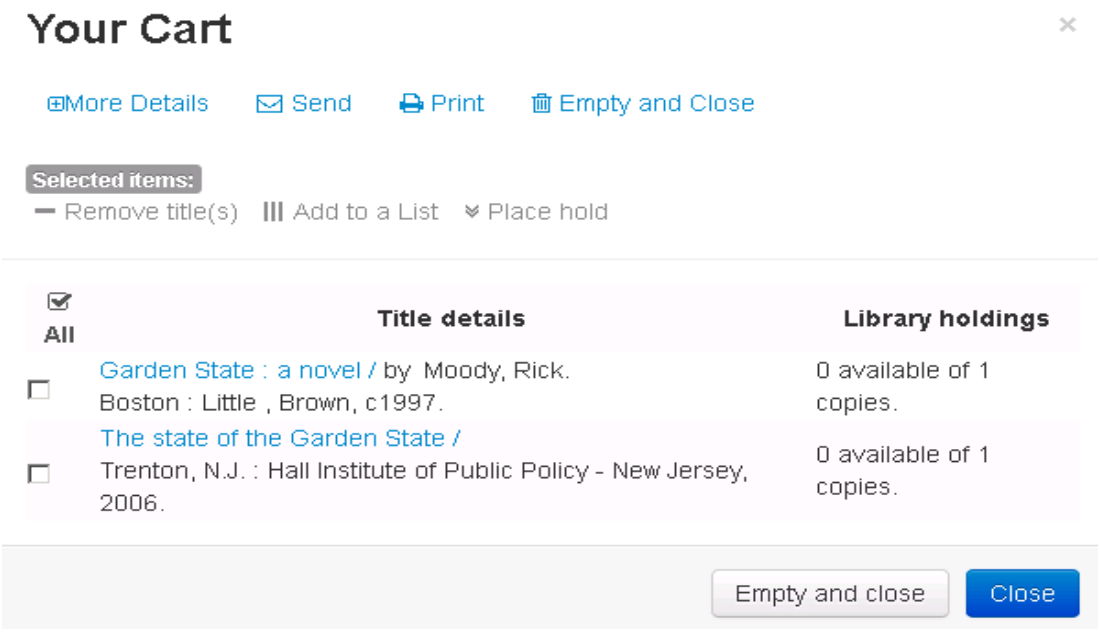
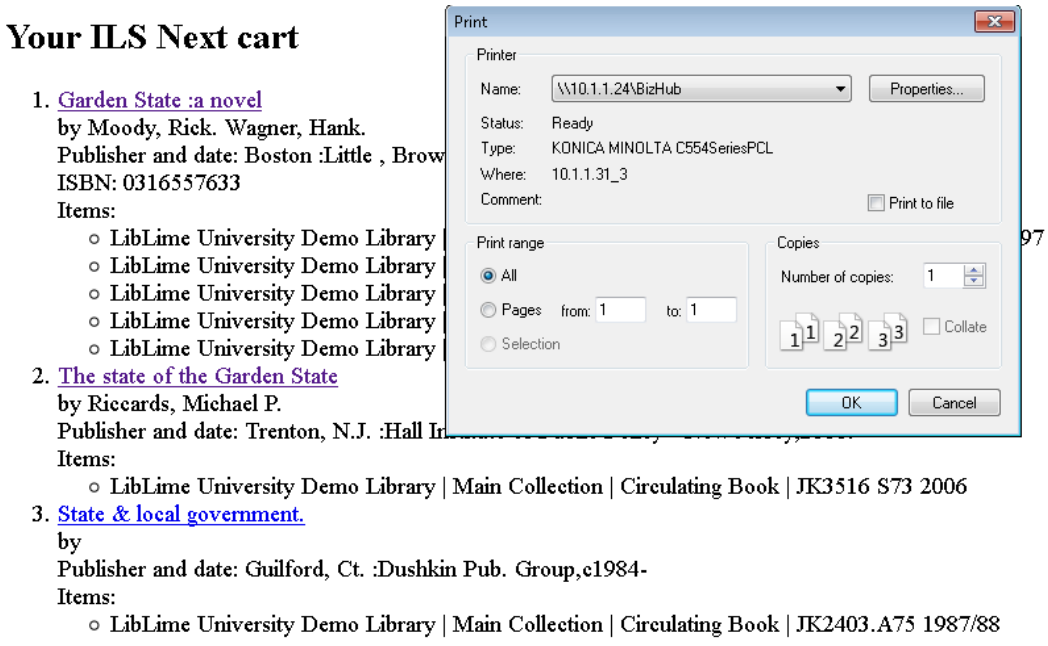

Your Cart
More Details
Send
Print
Empty and Close
Selected items:
Remove title(s)
Add to a List
Place hold
All
Title details
Library holdings
Garden State : a novel / by Moody, Rick. Boston : Little , Brown, c1997.
0 available of 1 copies.
The state of the Garden State / Trenton, N.J. : Hall Institute of Public Policy - New Jersey, 2006.
0 available of 1 copies.
Empty and close
Close

You can email the group of records (MARC format), print them, add to a list, or place holds. The cart is not persistent – if you create a cart during one session, it will not remain in place the next time you log in. It's meant as a temporary holding bin for a collection of records during a catalog session. The cart display does not include item data, but the print or download output does:



Your ILS Next cart

1. Garden State :a novel
   by Moody, Rick. Wagner, Hank.
   Publisher and date: Boston :Little , Brow
   ISBN: 0316557633
   Items:
   - LibLime University Demo Library
   - LibLime University Demo Library
   - LibLime University Demo Library
   - LibLime University Demo Library
   - LibLime University Demo Library
2. The state of the Garden State
   by Riccards, Michael P.
   Publisher and date: Trenton, N.J. :Hall In
   Items:
   - LibLime University Demo Library | Main Collection | Circulating Book | JK3516 S73 2006
3. State & local government.
   by
   Publisher and date: Guilford, Ct. :Dushkin Pub. Group,c1984-
   Items:
   - LibLime University Demo Library | Main Collection | Circulating Book | JK2403.A75 1987/88

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You can add items to the cart and print them without being logged in, but you must log into your account to be able to email them or add them to a list. In addition, your patron account record must have an email address for validation.

When you are finished with this group of records, you can empty the cart and close the window with the Empty and Close link.

17.9 Lists

If enabled (syspref virtualshelves), an icon labeled Lists appears in the upper right part of the Discovery Layer home page:

A patron must be logged into their account before creating or editing a list; existing public lists can be accessed without logging in. (Note that sites can change the name from Lists to something else, like Shelves or Collections.)

17.9.1 Viewing a List

Go to the Lists icon and click on the drop down. Select one of the lists to view. Note that lists you (the logged-in user) created are towards the bottom, under the caption "Your Lists."

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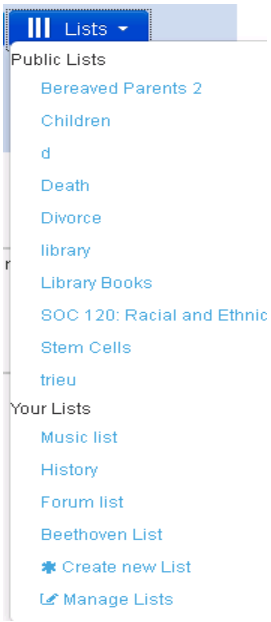
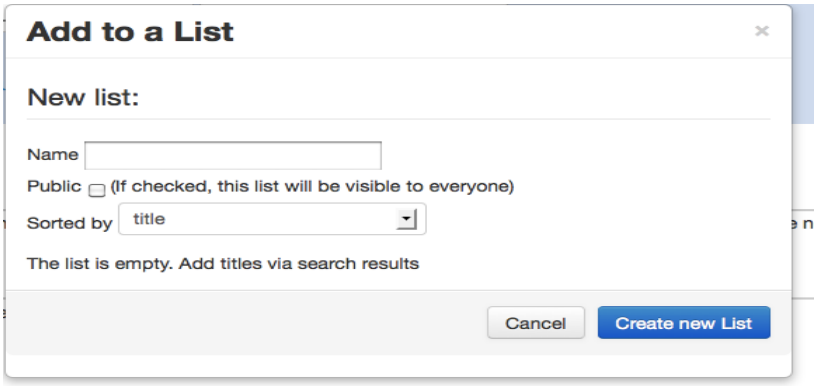


To create a list, go to the Lists icon and select Create New List; a box appears from which you can add or edit a list.



- For the new list, Create and enter the name of the list;
- Make the list public, if desired, which means it can be viewed by anyone;
- Choose how to sort the list – by title, author, or date;
- Click on Create new list.

Once your list is created, you can add items to it from any search while you're logged in to the Discovery Layer. The option to add to your list appears to the right of the bibliographic display, under "Title Actions:"

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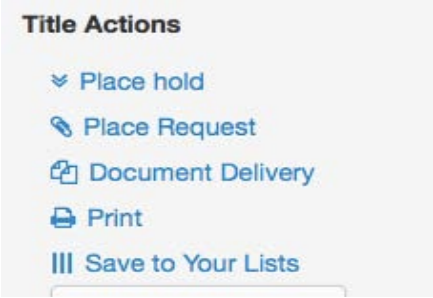
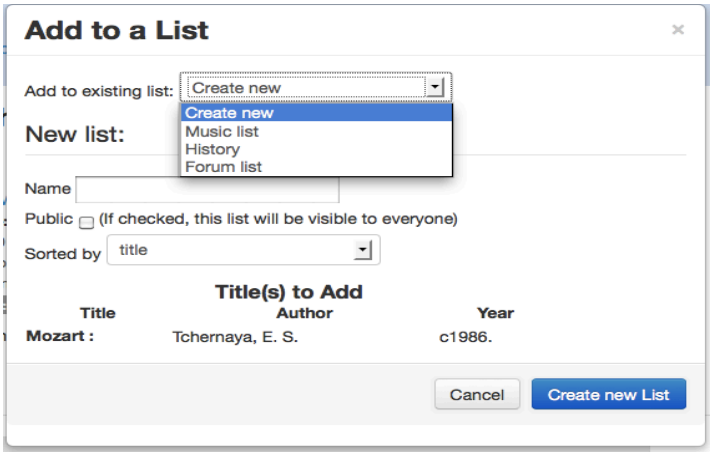
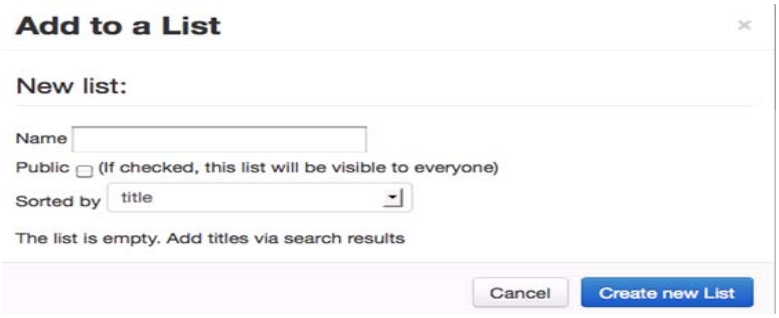


If you search for a title and then click on Save to Your Lists, the following screen options appear:



From here you can create a new list for the title, or select an existing list to add to. You can also make your list Public by checking the box, and you can determine how the list will sort (by title, author or date). The titles that are included on the list appear at the bottom.

You can also manage your list from the drop-down in the Lists icon. Here the options are to create a new list or manage an existing one. If you select Create, the following screen appears:



If you choose to Manage Lists, you are taken to your patron account record, where all of your lists are available for viewing and managing:

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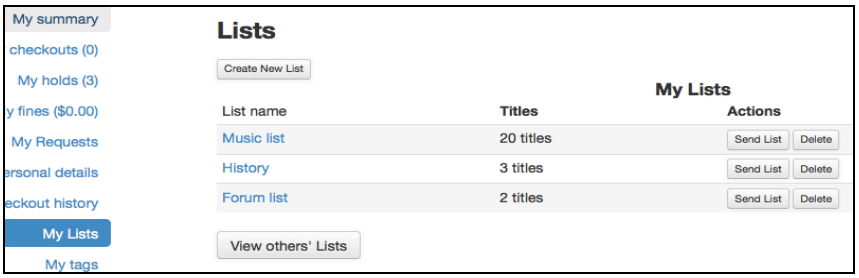
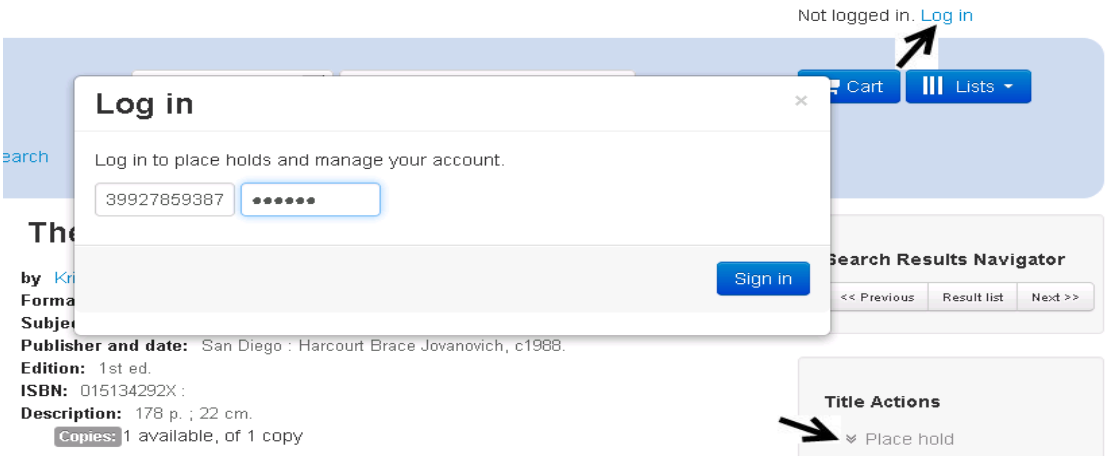


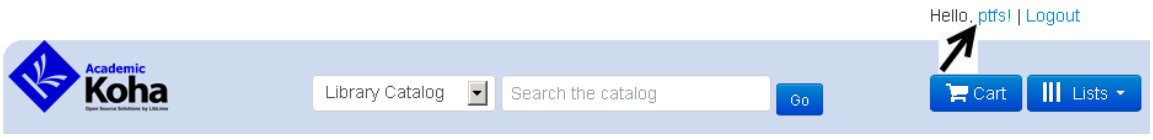
From your account page you can review the items on a list, edit the list, and send the list to an email address. To email a list, your patron account record must have an email address for validation. A list may also be deleted from here.

17.10 Logging In

You can log into your account at any time by clicking the Log In link in the upper right corner. If you click on something that requires a login status, such as placing a hold, you'll also be prompted:



Enter your ID and password. **NOTE: a user can log in either with the defined userid (OPAC Login field) or the cardnumber – if the value entered does not match the OPAC Login, it will try to match against a cardnumber.** The screen will change to show your name. You can then proceed with what you were doing, or go to your account page by clicking on your name.



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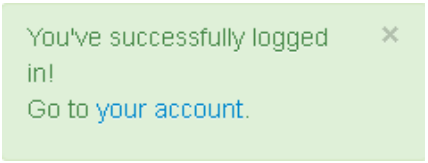
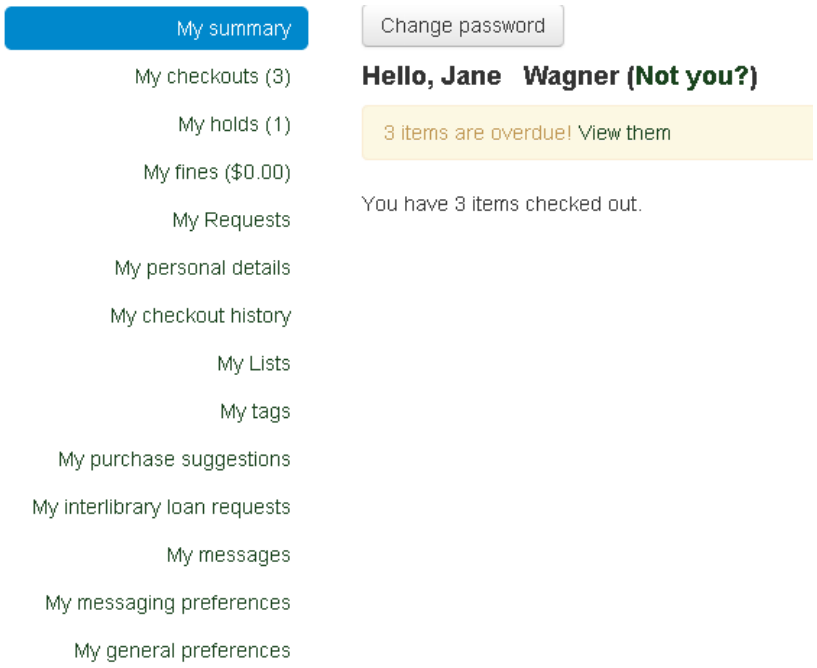
A pop-up message with a link to your account will also display briefly:

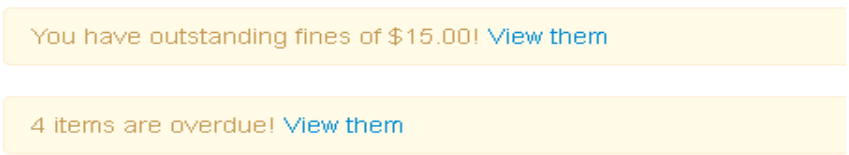


17.11 Discovery Layer Account

The first screen of your account area is the summary; it shows how many items you have out and has tabs for various functions. If there is a message or alert from the library, such as a waiting hold, the screen will show a message.



Other messages may show if you have overdue items or fines:



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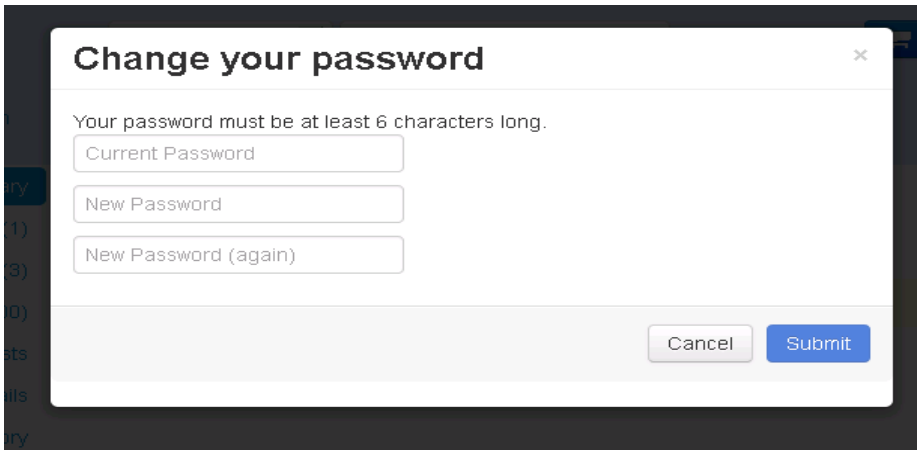
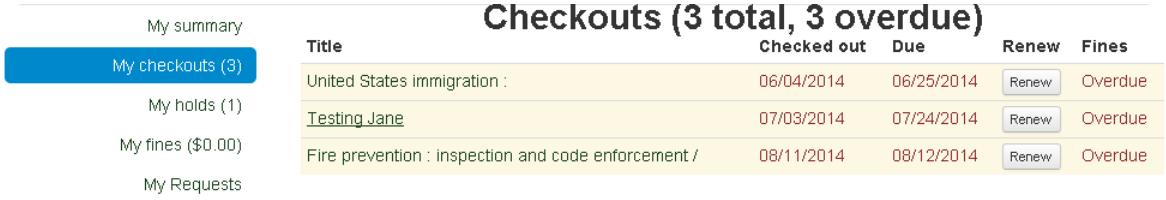
You can use the Change Password button at the top of this screen to change your password. That will bring up a pop-up window with boxes for the current and new passwords:



17.11.1 My Checkouts

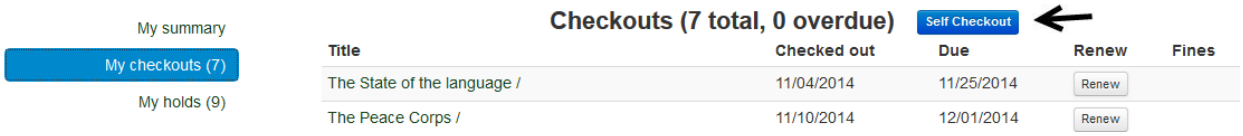
The My Checkouts tab shows what items you currently have checked out and any fines that have accrued.



If permitted, a Renew button will allow the item to be renewed.

17.11.1.1 Self Checkout

If the patron has the self_checkout granular permission (either directly or through a Role assignment), a Self Checkout button will show on the My Checkouts screen:



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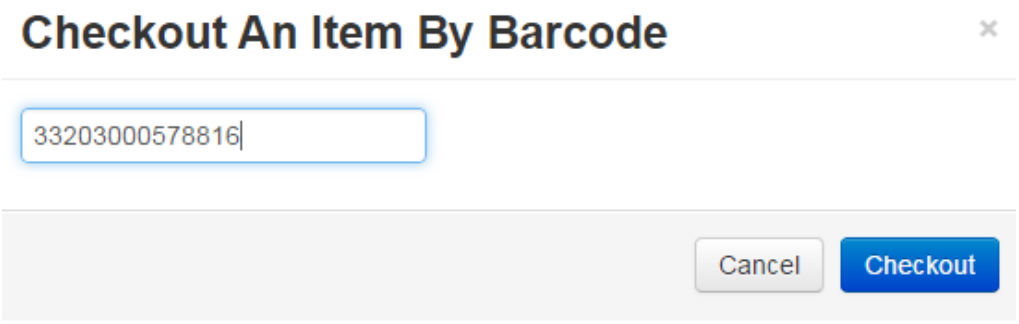
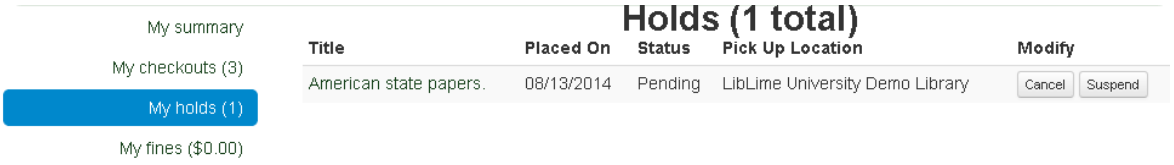
The patron can click that button, enter a barcode in the pop-up form, and check an item out:



17.11.2 My Holds

The My Holds tab shows details about your present holds.



You can see if a hold is waiting for pickup, or is still pending. If configured (syspref OPACDisplayRequestPriority), your position in the holds priority queue will show in parentheses after the Pending status. You may cancel any hold that has not yet been triggered.

17.11.2.1 Suspending Holds

Users may suspend any hold which has not yet been triggered (waiting for pickup). Click the Suspend button; a pop-up window will appear.

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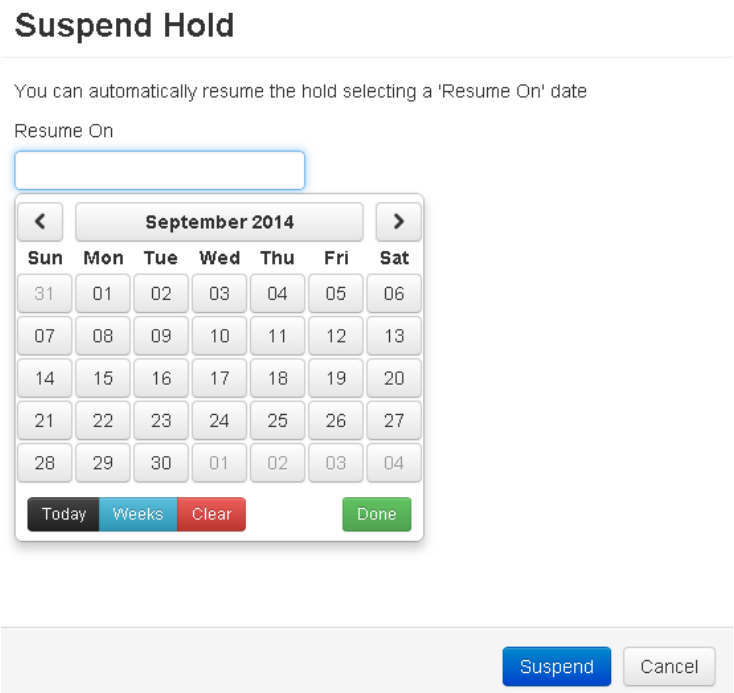
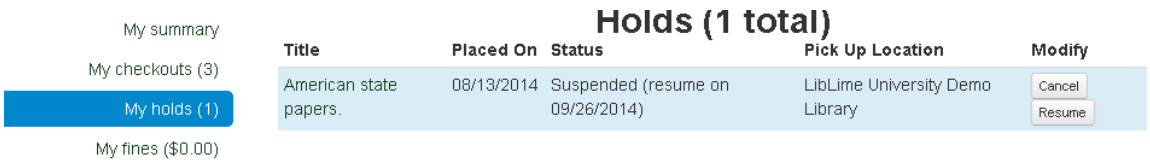

Suspend Hold
You can automatically resume the hold selecting a 'Resume On' date
Resume On
September 2014
Sun Mon Tue Wed Thu Fri Sat
31 01 02 03 04 05 06
07 08 09 10 11 12 13
14 15 16 17 18 19 20
21 22 23 24 25 26 27
28 29 30 01 02 03 04
Today Weeks Clear Done
Suspend Cancel

If desired, you can set a date for the hold to automatically resume (controlled by the cron job misc/cronjobs/holds/resume_suspended_reserves.pl). To set a date, click in the Resume On box and a calendar gadget will appear. Navigate to the desired date and click Done. Then click the Suspend button. If you want the hold to be suspended until you resume it, ignore the date field and just click Suspend.

The Discovery Layer display changes to show the suspend status, with a button to Resume the hold:


My summary
My checkouts (3)
My holds (1)
My fines ($0.00)
Holds (1 total)
Title Placed On Status Pick Up Location Modify
American state papers. 08/13/2014 Suspended (resume on 09/26/2014) LibLime University Demo Library Cancel Resume

Even if the hold was suspended with a “resume on” date, the user can resume it at any time by clicking the Resume button. It does not have to wait for the target date.

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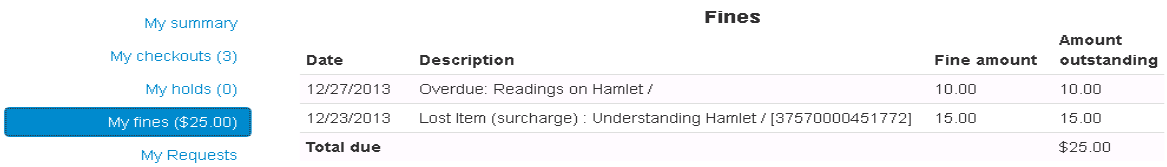
17.11.3 My Fines

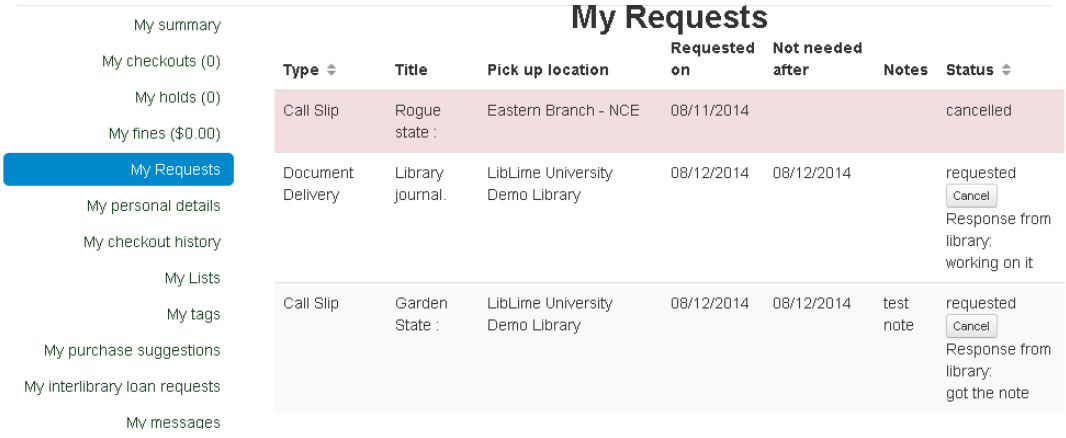
The My Fines tab will show current charges:



It will not show accruing fines on items that are still checked out.

17.11.4 My Requests

If call slips, document delivery, or informational request forms are configured, patrons can see their requests under this tab.



As library staff update the status or post responses, those become visible. See the section below on placing requests through the Discovery Layer.

17.11.5 My Personal Details

This tab shows patrons the contact information on file for them:

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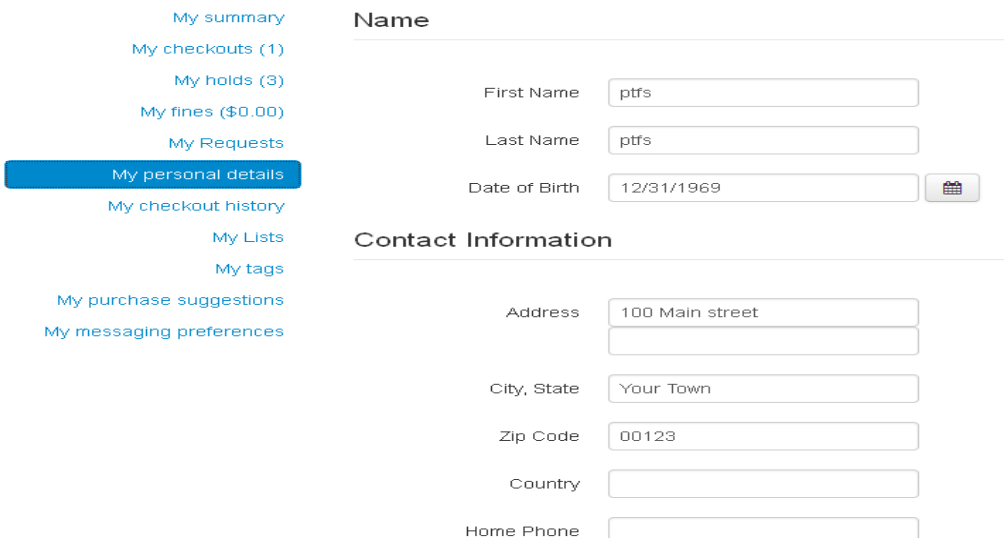
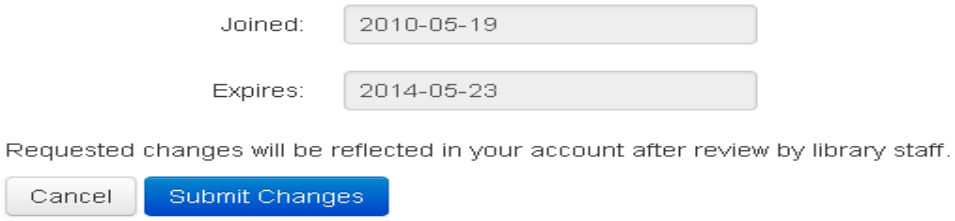
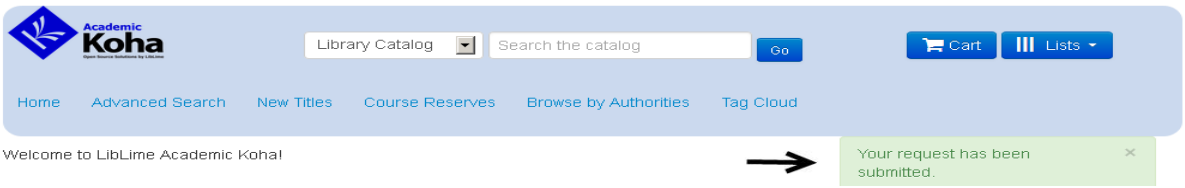


Patrons can enter new data in various fields (except for administrative ones like cardnumber and enrollment date, which are grayed out) and click the Submit Changes button at the bottom:



This generates an email to the address defined in the syspref KohaAdminEmailAddress; library staff must then review the updates and make the changes in the patron record as needed. Patrons may not directly modify the database.

After you click the Submit button, the system will revert to the main page of the Discovery Layer, with a message that your change has been submitted.



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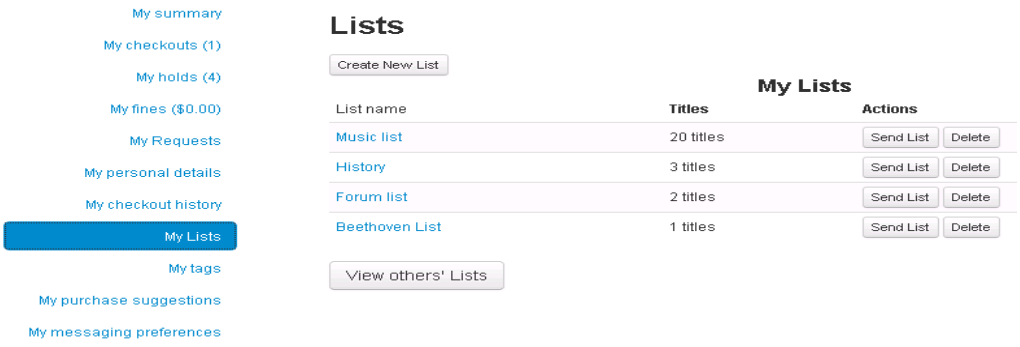
17.11.6 My Checkout History

If configured (syspref opacreadinghistory), patrons can see a list of their previous checkouts under this tab.

The list can be sorted as desired, by clicking on the arrows in the column headers.

17.11.7 My Lists

As covered under the Lists section, from your account page you can review the items on a list you created, edit the list, and send the list to an email address. A list may also be deleted from here.



17.11.8 My Tags

This tab shows any tags the patron has created, with a link to the title and an option to delete the tag.

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17.11.9 My Purchase Suggestions

If enabled (syspref suggestion and some associated configuration), patrons may create purchase suggestions from the Discovery Layer or see the status of previous suggestions. Patrons can delete suggestions if desired.

To create a new suggestion, click the "New Purchase Suggestion" link. That will open a data entry pop-up screen:

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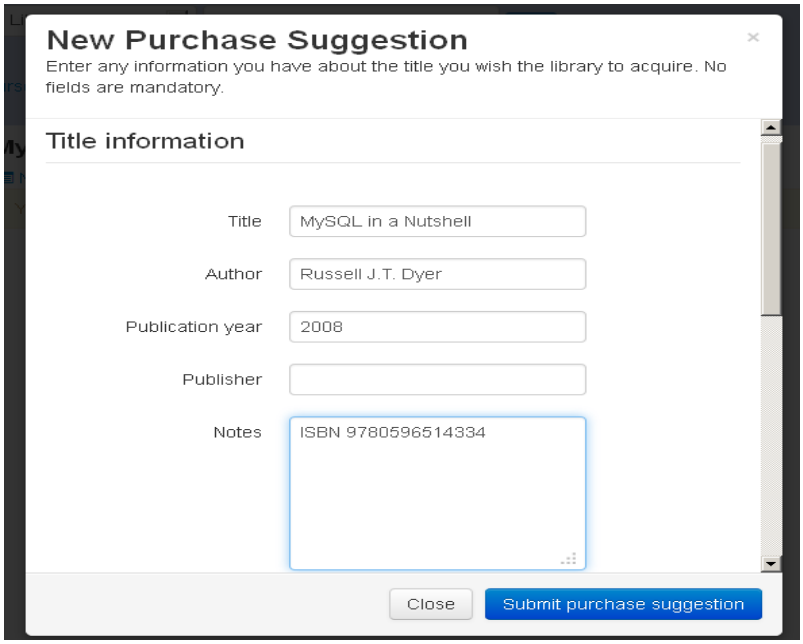
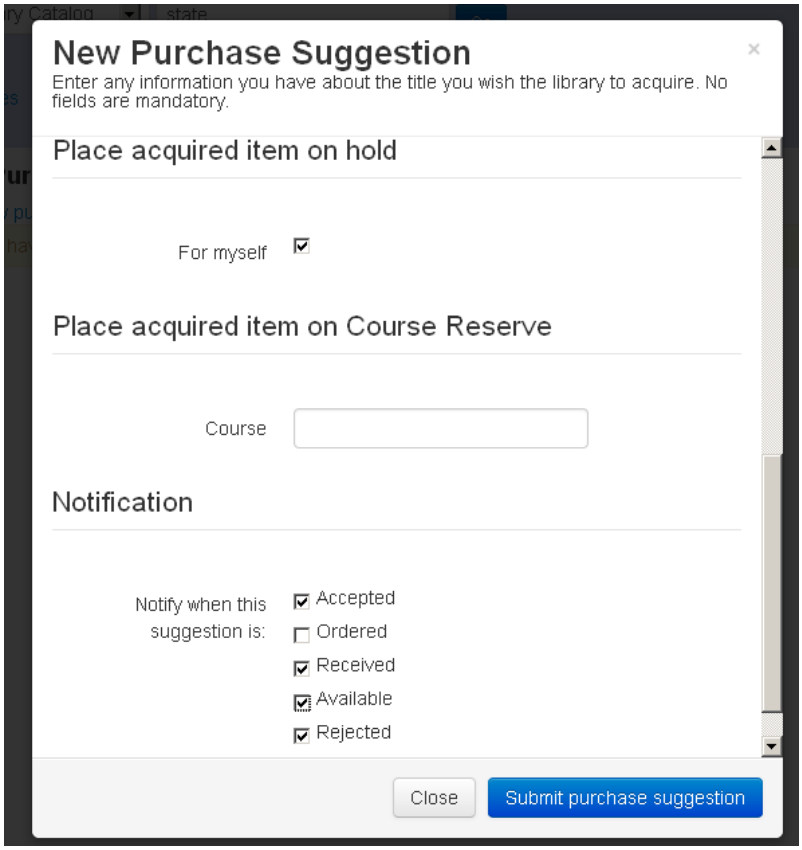


In the top part of the screen, complete as much information as possible about the requested title. Scroll down to ask for the item to be placed on hold or course reserve, and for notification options.



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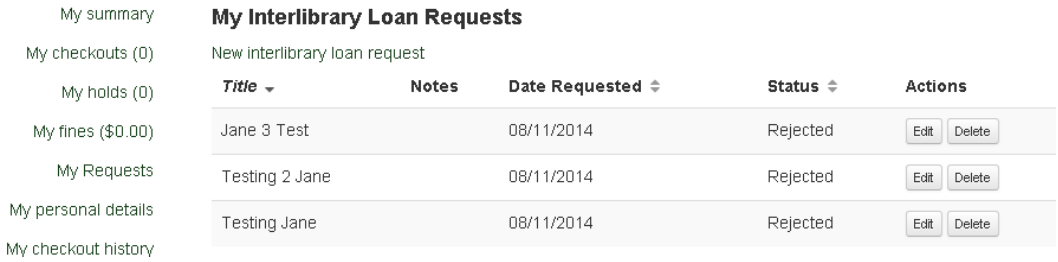
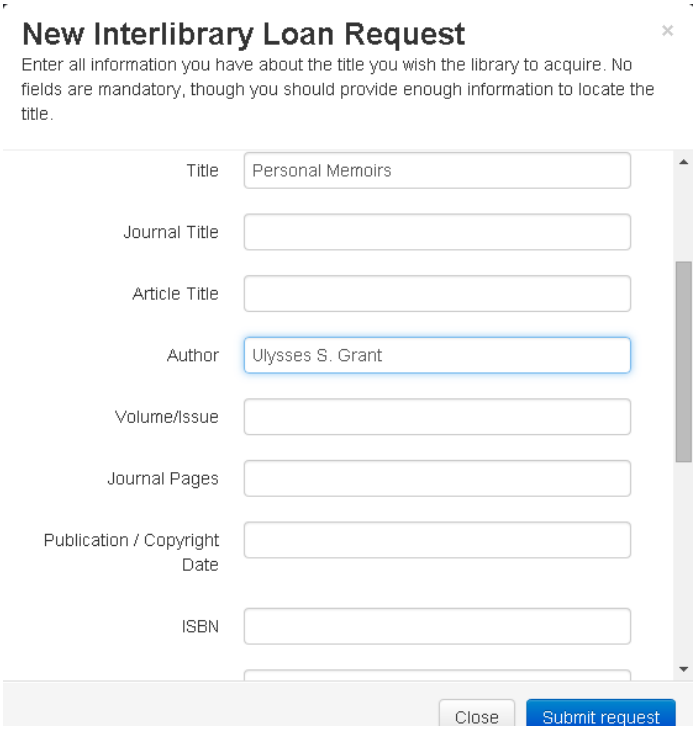
Library staff can review and act upon suggestions in Acquisitions.

17.11.10 My Interlibrary Loan Requests

If enabled (ILLRequests system preference), the Interlibrary Loan module allows patrons to place requests and staff to manage those requests. It works similarly to Call Slips and Document Delivery, but is intended for material not owned by the library. In the Discovery Layer, under the My Interlibrary Loan Requests tab, you will see a list of current requests and their status.



Click the New Interlibrary Loan Request link to create a new one. That opens a pop-up window with various fields (the fields on the form can be controlled by the site in the Discovery Layer configuration editor).



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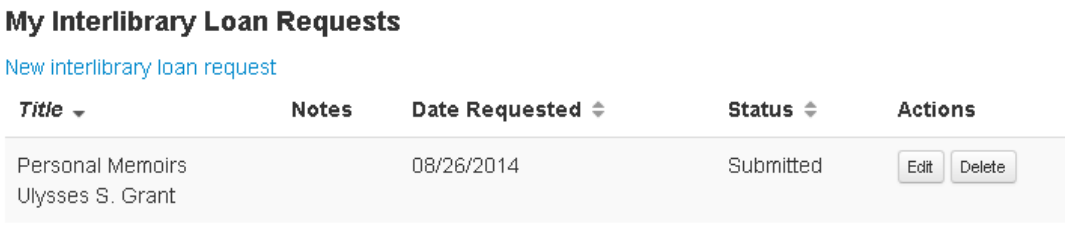
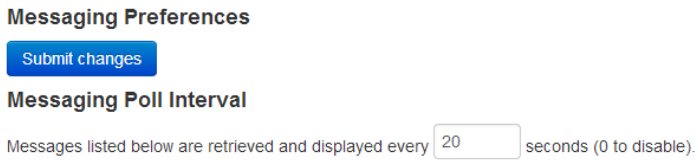
The user would fill out as much information as possible, and click Submit Request. The request is then visible in the Discovery Layer screen; the user could cancel it or edit it to include additional information:



17.11.11 My Messages

The *My Messages* tab shows a list of messages which have been delivered to the *list* message endpoint type. These are retrieved periodically according to the *Messaging Poll Interval* (in the *My Messaging Preferences* tab).


Messaging Preferences
Submit changes
Messaging Poll Interval
Messages listed below are retrieved and displayed every 20 seconds (0 to disable).

Messages stay on this list until they are explicitly removed, either by clicking the *X* button on a given message, or the *Clear All* button at the top of the page. The *Refresh* button will retrieve any new messages immediately. The *Print* button next to each message will print that message.

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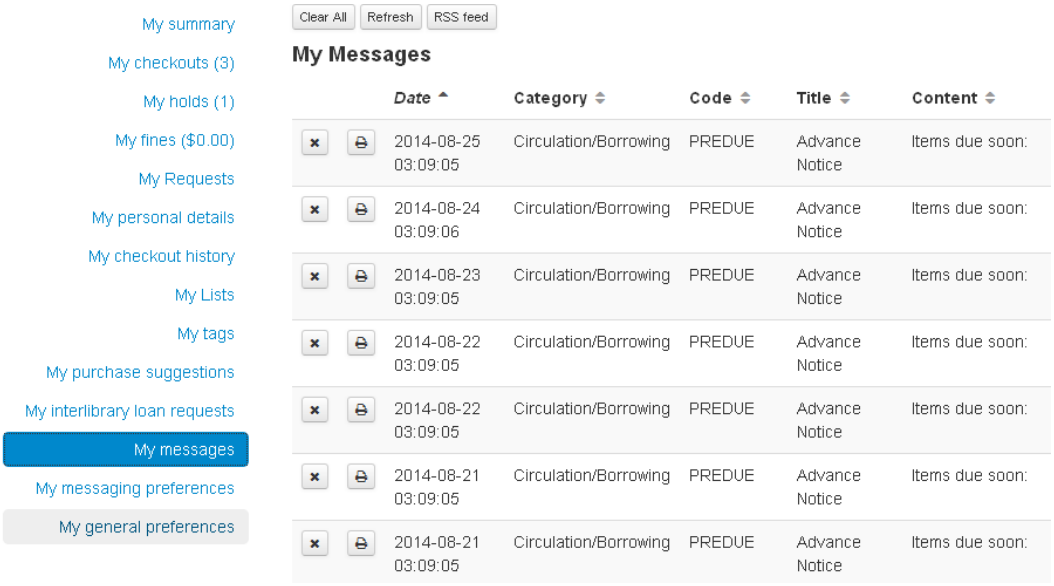

17.11.11.1 Discovery Layer Pop-ups

The Discovery Layer shows pop-up notifications in the upper right corner of the page. These pop-ups are created in response to messages routed to the *pop-up* endpoint type. The Discovery Layer can generate its own pop-ups, e.g., to indicate when a record has been saved or an error has occurred. Pop-ups persist until they time out; the persistence time is governed by the *Pop-up duration* setting in the *My User Preferences* tab. Alert pop-ups (red) always persist until closed by the user.

17.11.12 My Messaging Preferences

Under this tab, patrons can see exiting settings for notifications, and make changes as desired. Patrons may not opt out of overdue notices, but any other kind of notice can be specified here. The tab shows a table of all message types the patron is authorized to receive by their permissions. Message types are grouped by category. The *Scope* column indicates whether this is a unicast message (*Sent to Me*) or multicast message (*From Anyone*). The remaining columns indicate the delivery preferences.

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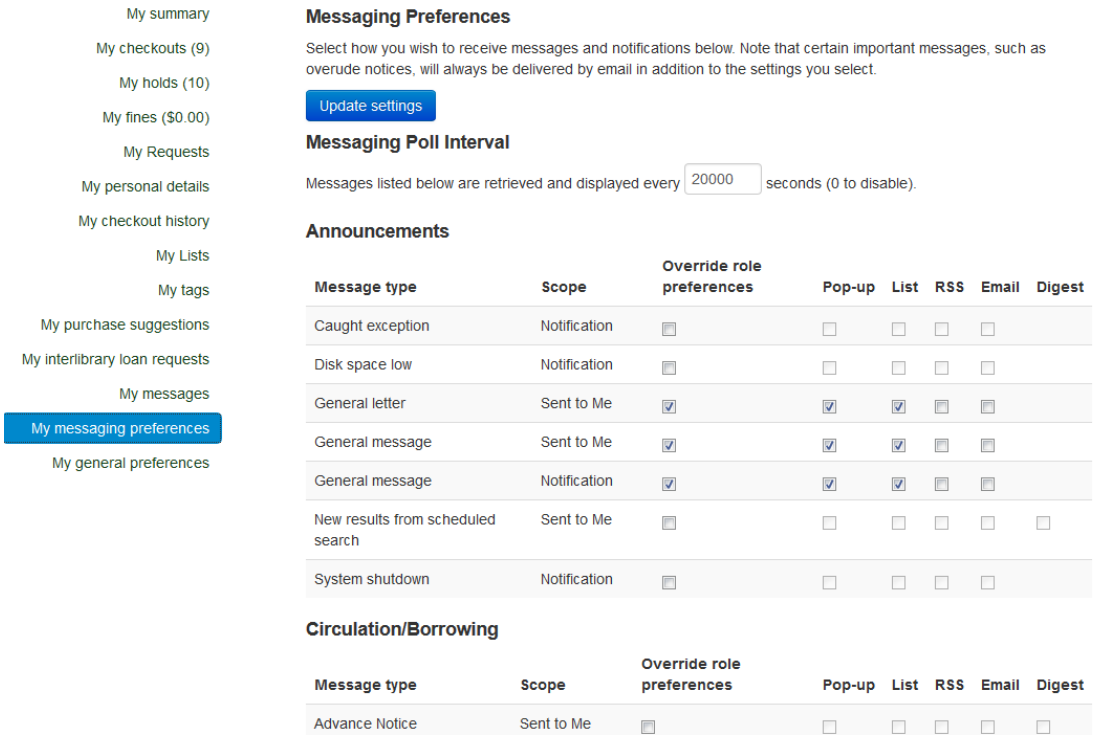
In the Discovery Layer, individual patrons can choose to override the Role defaults for their own settings on the My Messaging Preferences tab:


My summary
My checkouts (9)
My holds (10)
My fines ($0.00)
My Requests
My personal details
My checkout history
My Lists
My tags
My purchase suggestions
My interlibrary loan requests
My messages
My messaging preferences
My general preferences
Messaging Preferences
Select how you wish to receive messages and notifications below. Note that certain important messages, such as overude notices, will always be delivered by email in addition to the settings you select.
Update settings
Messaging Poll Interval
Messages listed below are retrieved and displayed every 20000 seconds (0 to disable).
Announcements
Message type | Scope | Override role preferences | Pop-up | List | RSS | Email | Digest
Caught exception | Notification
Disk space low | Notification
General letter | Sent to Me
General message | Sent to Me
General message | Notification
New results from scheduled search | Sent to Me
System shutdown | Notification
Circulation/Borrowing
Message type | Scope | Override role preferences | Pop-up | List | RSS | Email | Digest
Advance Notice | Sent to Me

If the *Override role preferences* box is unchecked, the remaining checkboxes (*Pop-up*, *List*, *RSS*, etc) show the patron's role preferences, if any. To alter these, the patron must

- check *Override role preferences*
- change their delivery settings or unsubscribe from messages entirely (by unchecking all endpoint type boxes).

For some message types, users may request an email *digest*, in which case all email messages of a given type are merged together whenever the queue is processed (typically daily).

Pop-up and list messages are retrieved periodically by the Discovery Layer from the LAK backend. The frequency is governed by the *Messaging Poll Interval* setting at the top of the page. This setting has role and category role defaults; if none of these are set, the default is 20 seconds. The duration that pop-ups stay on the screen is governed by a setting in the *My General Preferences* tab (see below).

Changes to any of these settings are not saved until the patron presses the *Submit Changes* button!

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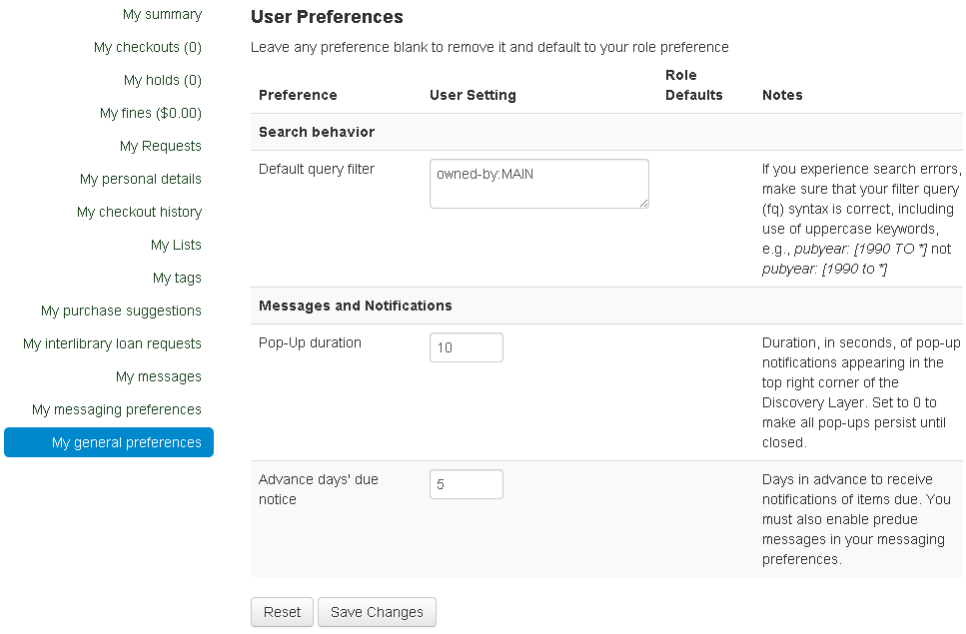
NOTE: Regardless of role or individual settings, overdue notices will ALWAYS be sent by email. Patrons may not opt out completely from that message.

IMPORTANT: there is a subtle but important semantic difference between user and role preferences. For example, suppose Alice and Bob are both assigned the *AdultPatronRole* role, and that role is subscribed to receive overdue messages by RSS alone. Alice overrides these role preferences (checking the *Override role preferences* box) but keeps them as they are (i.e., *RSS* is checked, but all others are unchecked). Later, a staff member decides to change the *AdultPatronRole* role to receive overdue notices by email. Now, Bob will receive these by email, because he has not overridden his role preferences. **Alice, however, will still get overdue notices by RSS, because she has overridden her role preferences.** If she unchecks *Override role preferences,* she will automatically go back to the current role defaults (email).

17.11.13 My General Preferences

The General Preferences tab has an assortment of options. Staff can also set these on patron records or Role records through the staff interface; patrons can override those settings here.


My summary
My checkouts (0)
My holds (0)
My fines ($0.00)
My Requests
My personal details
My checkout history
My Lists
My tags
My purchase suggestions
My interlibrary loan requests
My messages
My messaging preferences
My general preferences
User Preferences
Leave any preference blank to remove it and default to your role preference
Preference
User Setting
Role Defaults
Notes
Search behavior
Default query filter
owned-by:MAIN
If you experience search errors, make sure that your filter query (fq) syntax is correct, including use of uppercase keywords, e.g., pubyear: [1990 TO *] not pubyear: [1990 to *]
Messages and Notifications
Pop-Up duration
10
Duration, in seconds, of pop-up notifications appearing in the top right corner of the Discovery Layer. Set to 0 to make all pop-ups persist until closed.
Advance days' due notice
5
Days in advance to receive notifications of items due. You must also enable predue messages in your messaging preferences.
Reset
Save Changes

The first one (Default Query Filter) allows the user to set a filter that will automatically be applied to all searches. See the manual section on searching for more information; this setting should probably not be used except in special circumstances. You must be familiar with the Solr index names and search syntax to set these up properly. Use this option with caution – invalid settings could disable searching altogether.

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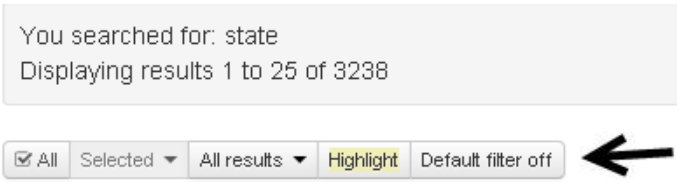
The filter is applied automatically, but the patron can turn it off on a search results set by clicking the Default Filter Off button:



The search re-executes, and the button toggles to Default Filter On.

The Pop-Up Duration setting controls how long a pop-up message remains on the screen in the Discovery Layer. The default is 10 seconds; users can set that to any duration (in seconds) desired. Setting this to zero will make all pop-ups persist until the user actively closes them.
The Advance Days' Due Notice is the number of days in advance that Advance Notices should be sent. If the patron opts to receive Advance Notices, this is what controls the timing.

17.12 Placing Holds

There are links in the Discovery Layer to place holds in a search results list, the title display page, the cart, and lists. From whatever point you begin, a pop-up window will show you the title and hold options:

If needed, select a pickup location. Click the Place Hold button to proceed.

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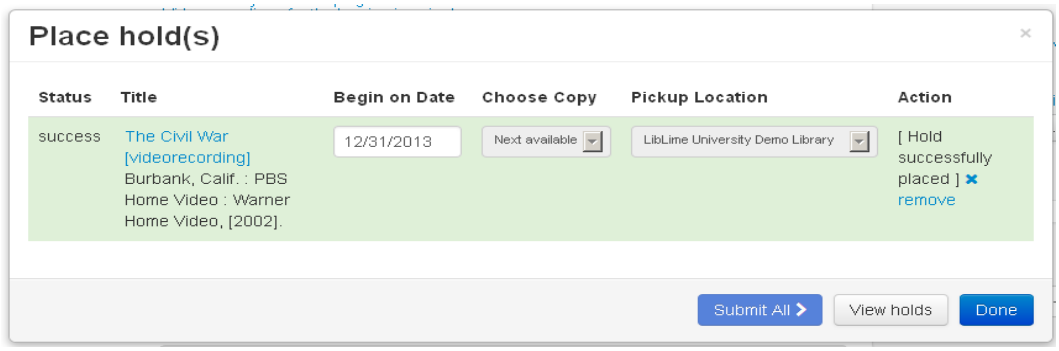
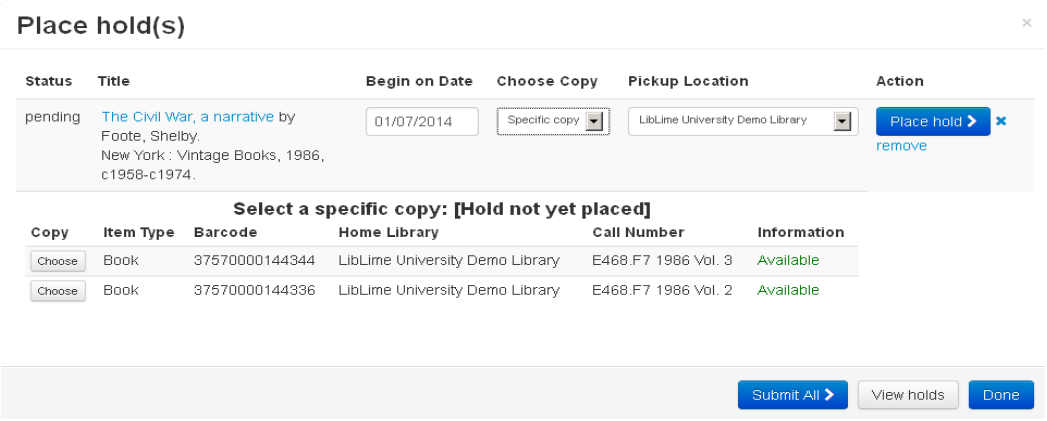


If your library allows item-specific holds (syspref OPACItemHolds), you can use the Choose Copy pull-down to move from title-level ("Next Available") to item-level display ("Specific Copy"). Then click the Choose button next to the desired item. However, in most cases your users should select Next Available.



You can view all holds and cancel holds if desired – click View Holds and you'll be taken to your account Holds tab (see that section above). Use the Done button or click the upper-right-corner X to close the holds pop-up window.

17.13 Recalls

If the system and the applicable circulation policy are configured to allow it, a patron placing a hold on a checked-out item may request a recall. This will show as an option in the holds pop-up window.

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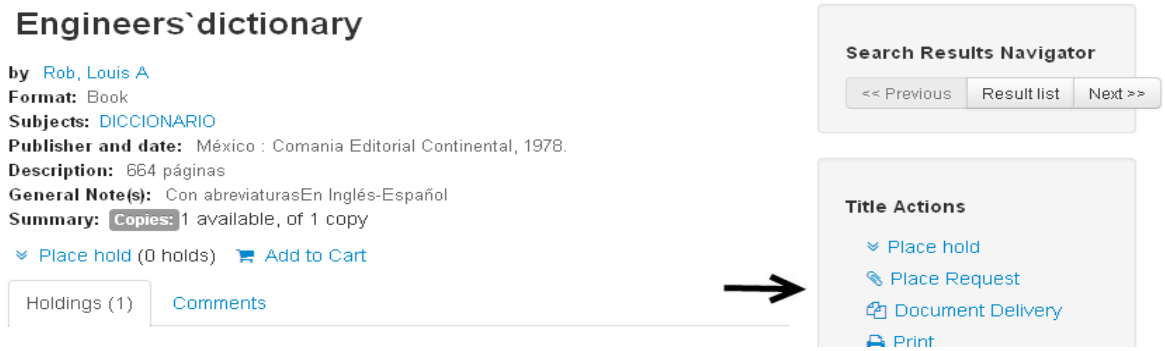
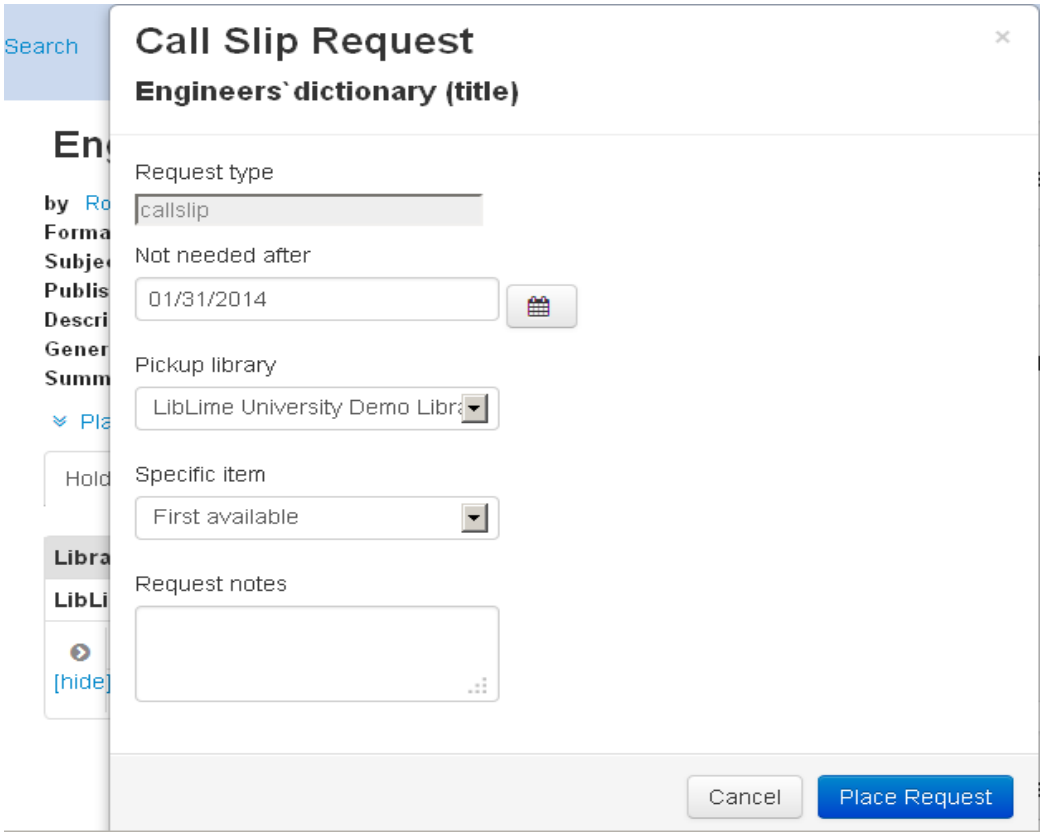
17.14 Call Slips and Document Delivery

If configured, Call Slip and Document Delivery features let patrons place requests on items in closed stacks or remote storage, for retrieval by the staff. Most call slip and document delivery requests are placed by the patron in the Discovery Layer. The patron must be logged in to place a request. Search for the item that is wanted; when it is retrieved click on the Place Request or Document Delivery links at the right of the detailed bibliographic record:



This will open the Request screen as a pop-up:



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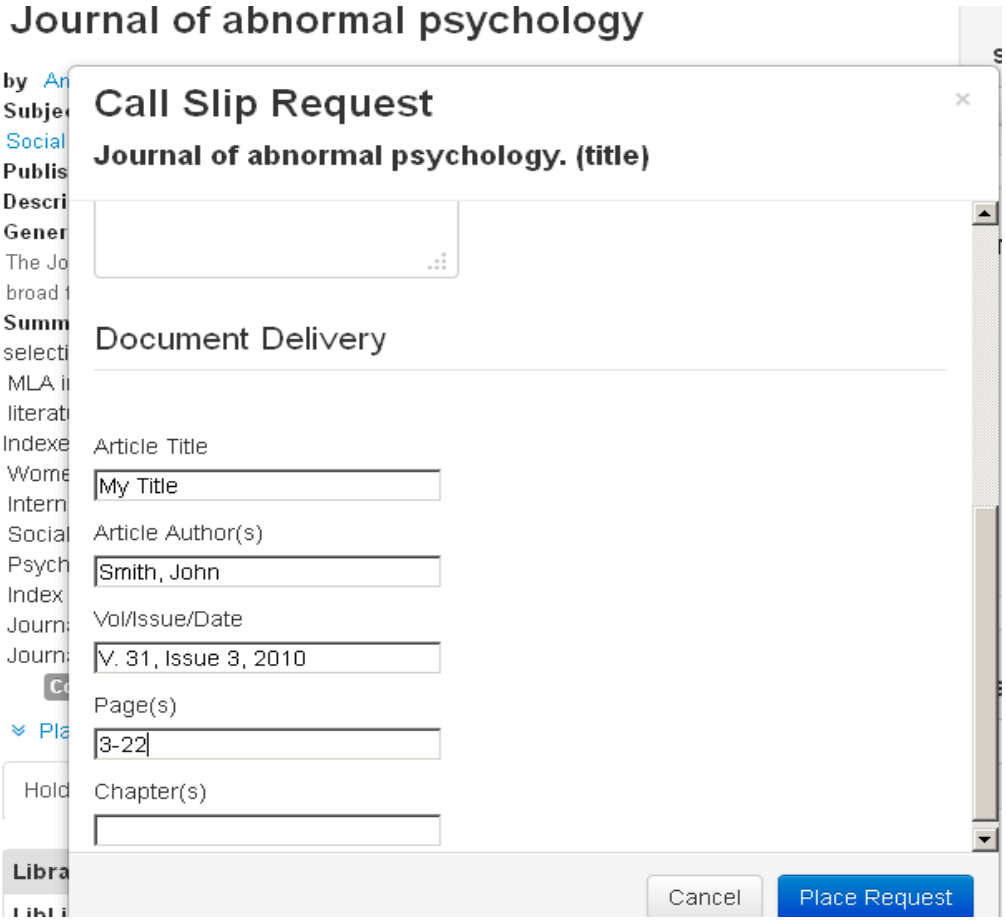
The request screen asks for:

- The request type
- Not Needed After date (this will be the expiration date of the request);
- Pickup Library (default is the library from which the request is made);
- Items requested, from the dropdown choices;
- Notes

In the case of a Document Delivery request it also requires the specific citation information:



Click Place Request when finished. When the request is saved it will be given a Request ID number. The request shows in the patron's account record with the current status:

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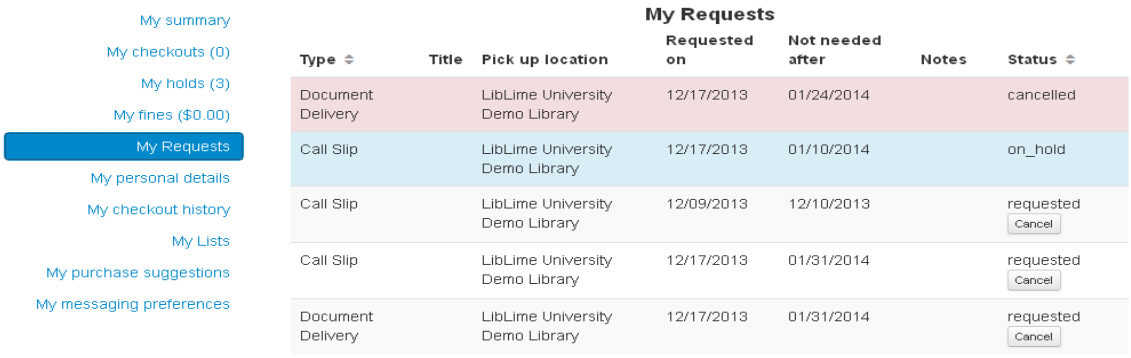
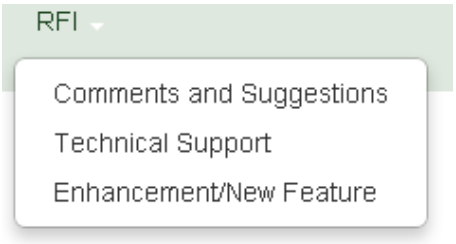


17.15 Other Request Forms

Three informational forms have been added; these are Comments and Suggestions, Technical Support, and Enhancement/New Feature. The RFI (Request for Information) module controls these; it is only visible if you are logged into the Discovery Layer. If you are logged in, you will see the RFI menu pulldown in the masthead (note that library staff may change the default descriptions to something specific to the site, or hide one or more of the options):



All three types produce a general request form where users can enter notes, comments and questions:

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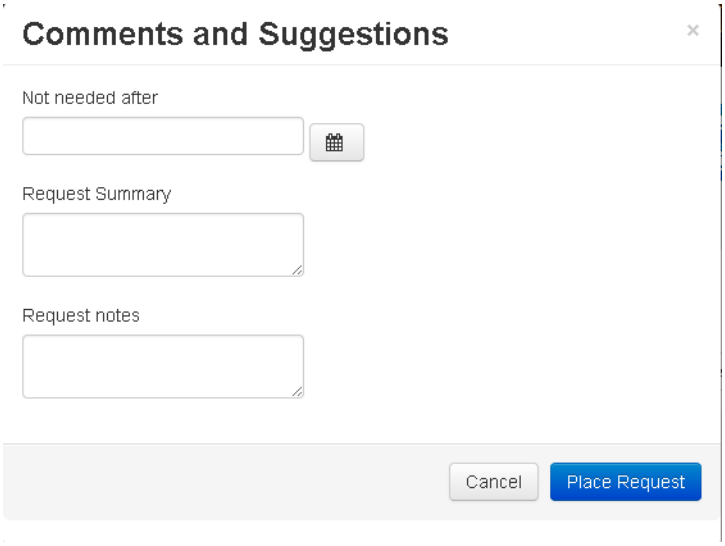

As with call slips and document delivery, these requests show on the patron's My Requests tab:

My Requests

Type	Title	Pick up location	Requested on	Not needed after	Notes	Status
Call Slip	State of the unions :	LibLime University Demo Library	10/22/2014	11/30/2014	test	requested Cancel
Comments and Suggestions	test comment RFI		10/22/2014	10/22/2014	test Jane	requested Cancel Response from library: test reply
Enhancement/New Feature	test enhancement		10/22/2014	11/29/2014		requested Cancel
Technical Support	test Techsupport		10/22/2014			requested Cancel

Responses from library staff will be delivered to this screen, so patrons will need to monitor it.

17.16 Comments

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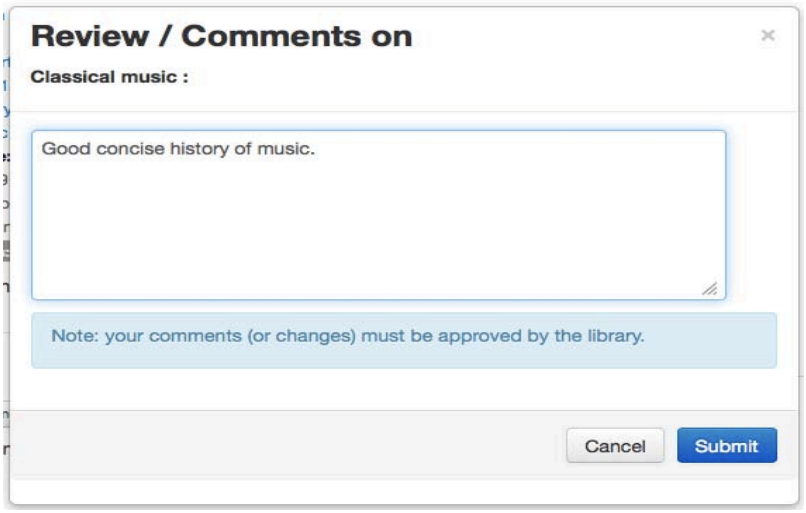
The DLS allows users to write comments or reviews about items held by the library. These comments are available for others to read. To submit a comment in the OPAC the user must be signed in.

Search for the record you wish to comment on, or click on the "Comments" tab that appears in the holdings display of the bibliographic record:

A History of western music
by Grout, Donald Jay
Subjects: Music--History and criticism
Publisher and date: New York: W.W. Norton c2006.
Edition: 7th
ISBN: 0393979911
Description: xxviii, 965, 128p. : ill. (chiefly col.) col. maps; 27 cm.
Copies: 1 available, of 1 copy
Place hold (0 holds)
Add to cart
Add a tag
Holdings (1)
Comments
Add new comment
There are no comments for this title.

Click on "Add New Comment" and write your comments.


Review / Comments on
Classical music :
Good concise history of music.
Note: your comments (or changes) must be approved by the library.
Cancel
Submit

The user is informed that comments must be approved by library staff. When you click Submit, a pop-up message appears saying the comment has been successfully submitted and will be published after staff has approved it.

Once approved, comments can be viewed by any user:

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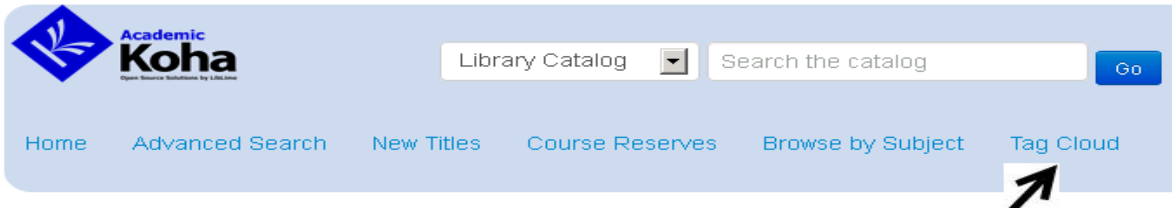
Once a comment is approved or deleted by staff it cannot be retrieved or changed.

17.17 Tags

Once tags are enabled, a patron can search by existing tags and add tags to the details record and/or results list. Tags can be searched and viewed without logging in, but you must be logged into your account in order to create new tags.

The tag cloud, which is accessed in the header section of the OPAC,



opens a pop-up window with the existing list of tags to search from:

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Clicking on a tag in this cloud will take you to all records that have the tag assigned to it. Within the record you can see that it has an assigned tag, with the total number of records containing it in parentheses next to the tag. It can be seen from the results list:

1
The civil war
by Caesar, Julius Gardner, Jane F
Format: Book
Publisher and date: New York : Dorset Press, 1985, c1976.
ISBN: 0880290412
Holdings: 1 copy.
Copies available at LibLime University Demo Library Main Collection [DG266.C42 1985]
Tags from library users: Civil War
Place hold (0 holds on 1 item)
Add to cart
Add a tag

and from the details record:

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You must be logged in to add your own tag to a record. Search for the record you want and, when found, click on the Add a Tag link in the results list or title record.

It will expand to a text box; enter your term and click Add.

If required by your system configuration, new tags must be moderated and approved before they will appear in the tag cloud. Patrons can always see their own tags under their account in the Discovery Layer (see that section above).

17.18 Ratings

By default, this feature is hidden; to enable it, place this code in the Discovery Layer Configuration Editor Inline Styles section:

.search-result-score{ display: block; }

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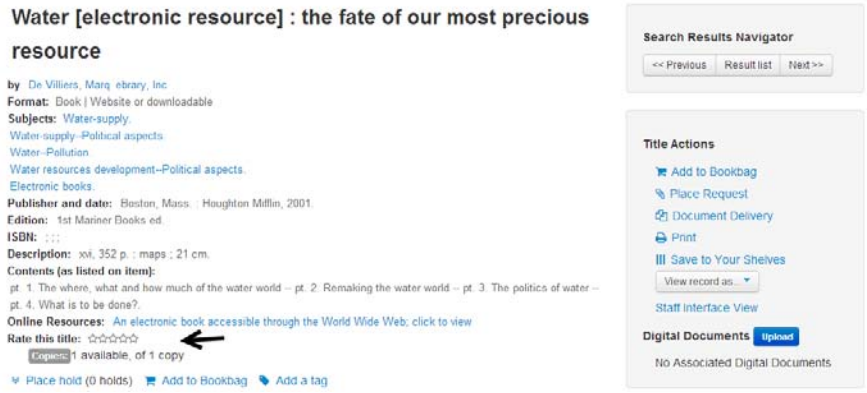
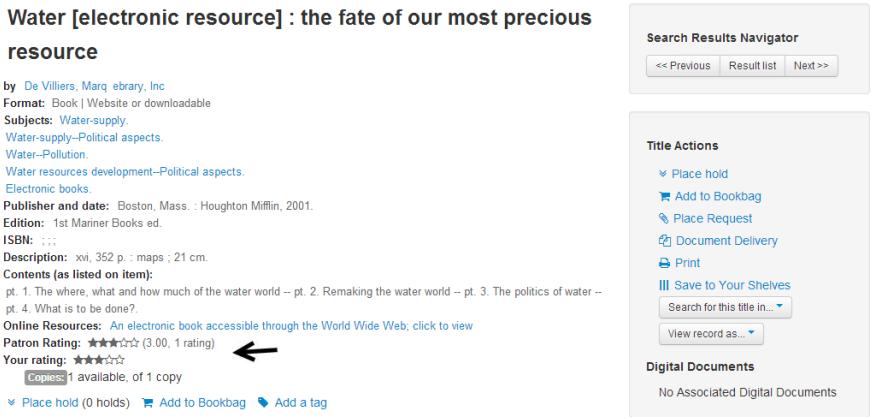
Users with appropriate granular permissions (see earlier section on ratings) will have the ability to rank a bibliographic record and/or view bib ratings but not create or modify them. *Users lacking these permissions will not see bib rankings at all.* By clicking on the stars in the display 1-5 (1 is lowest, 5 is highest) a user can show their rank or approval of a title.


Water [electronic resource] : the fate of our most precious resource
by De Villiers, Marq ebrary, Inc
Format: Book | Website or downloadable
Subjects: Water-supply.
Water-supply--Political aspects.
Water--Pollution.
Water resources development--Political aspects.
Electronic books.
Publisher and date: Boston, Mass. : Houghton Mifflin, 2001.
Edition: 1st Mariner Books ed.
ISBN: ; ; ;
Description: xvi, 352 p. : maps ; 21 cm.
Contents (as listed on item):
pt. 1. The where, what and how much of the water world -- pt. 2. Remaking the water world -- pt. 3. The politics of water -- pt. 4. What is to be done?.
Online Resources: An electronic book accessible through the World Wide Web; click to view
Rate this title:
Copies: 1 available, of 1 copy
Place hold (0 holds) Add to Bookbag Add a tag
Search Results Navigator
<< Previous Result list Next >>
Title Actions
Add to Bookbag
Place Request
Document Delivery
Print
Save to Your Shelves
View record as...
Staff Interface View
Digital Documents Upload
No Associated Digital Documents

After a bib is ranked, the bib detail page display will change; the ranking assigned by the user (logged in) will display as will all patron/user rankings: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Online Resources: An electronic book accessible through the World Wide Web; click to view
Patron Rating: (3.00, 1 rating)
Your rating:
Copies: 1 available, of 1 copy
Place hold (0 holds) Add to Bookbag Add a tag
Search Results Navigator
<< Previous Result list Next >>
Title Actions
Place hold
Add to Bookbag
Place Request
Document Delivery
Print
Save to Your Shelves
Search for this title in...
View record as...
Digital Documents
No Associated Digital Documents

Rankings are also displayed in the search results page.

1 Water [videorecording]
by Sarala.; Ray, Lisa, 1972-; Abraham, John, 1972-; Biswas, Seema.; Manorma.; Hamilton, David; Mehta, Deepa, 1949- Fox Searchlight Pictures; Mongrel Media; Telefilm Canada; Noble Nomad Pictures; Echo Lake Productions; Twentieth Century Fox Home Entertainment, Inc
Format: DVD
Language: हिन्दी (Hindi)
Publisher and date: Beverly Hills, CA : 20th Century Fox Home Entertainment, [2006]
Holdings: 1 copy. (none available).
(4.00, 1 rating)
Rate this title:
Place hold (0 holds on 1 item) Add to Bookbag Add a tag

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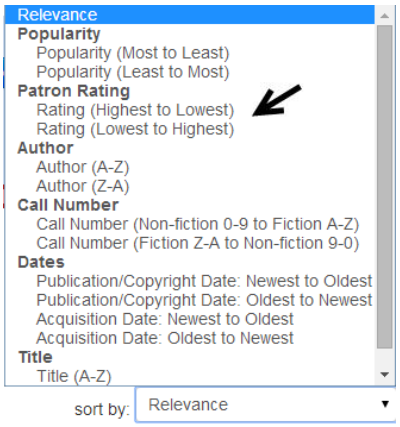
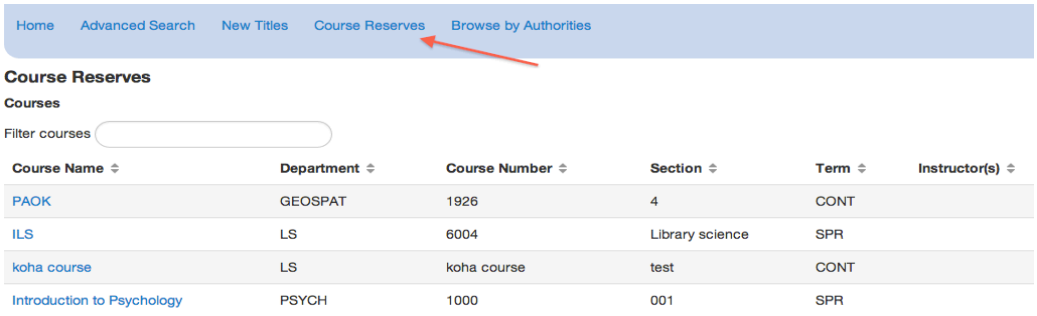
The rank assigned to each bibliographic record is stored by Solr so it can be used when organizing search results to show titles ranked highly by others atop a search results list; options for relevancy are expanded to include “Patron Ranking” as a category.



17.19 Course Reserves

If Course Reserves are enabled, users can view course materials through the Discovery Layer; click on the link in the masthead:



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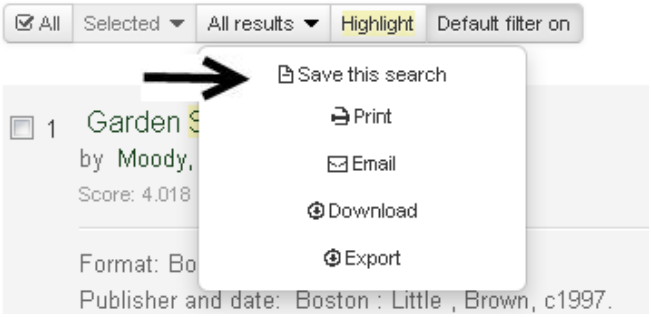
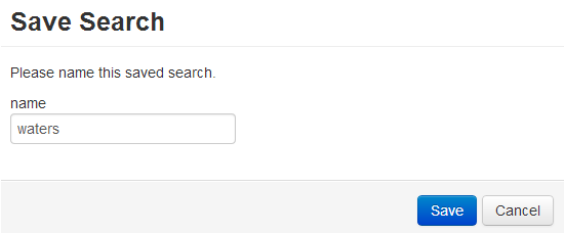
17.20 Saved Searches

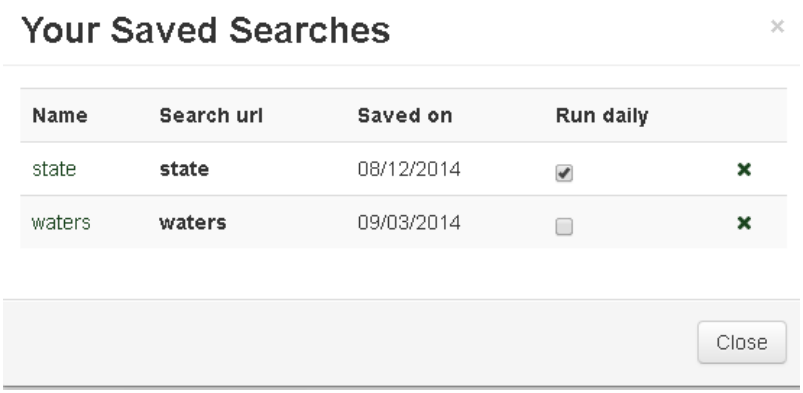
When logged in to the Discovery Layer, all users have the ability to save a search. To do this, create a search and view the results. At the top of the results list, you will see the search strategy used. Under All Results, the first option is to Save This Search:



Selecting that option will bring up a screen where you can name the search:



To execute a saved search, click the Saved Searches link in the masthead. You'll get a pop-up window with your existing searches:



Note that you can schedule a search to run daily; if you select this option a nightly cron job will run the search and email the results to you.

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17.21 Map / Geospatial Functionality

Bibliographic records with key data in the 034 field (Coded Cartographic Mathematical Data) will display in a map if the GeoSpatial options are configured upon install. See the section under Searching for more information and tips.

18. Basic System Configuration and Administration

There are a great many options and settings for configuring the DLS. Most of these will be reviewed and set at implementation, and will not need further attention unless library policies change. Some will need additional entries as time goes on, such as calendar closed dates, item types, patron categories, circulation rules, and course reserves.

Access to configuration options is limited to staff users with administrative or superlibrarian rights. See the separate Superlibrarian Training and Configuration Guide for details about system setup and management.

19. Discovery Layer Configuration

Various sections of the Discovery Layer can be customized for appearance or functionality. This is done through the Discovery Layer configuration editor. Access to this new editor requires superlibrarian rights; you will also need to log into the Discovery Layer. The older OPAC interface was controlled primarily by system preferences which remain (under the Legacy OPAC tab) but are not used in the Discovery Layer. They will probably be hidden or removed in a future version.

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Details on customizing the Discovery Layer are found in the separate Discovery Layer Customization Guide document.

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Appendix 1: Solr Index Names

There are several places (record matching rules, Discovery Layer search configuration) where you may need to know the name of the Solr index. Here is the default configuration for the current version (subject to change). Much of this may not make sense; the index name is in the first column and should be reasonably obvious. Some indexes are used for internal purposes.

id | record | emit_id
rtype | record | emit_bib_rtype
biblionumber | 999c

text | record | fullmarc
text | 001[0-15] | trim
f001_lc | 001[0-15] | | trim

author-display | 100a |
author-full | 100abcd 100q 110ab 111ab 245c 505r 700abcd 700q 710ab 711ab | concat
author-sort | 100a 110a 111a | | first

title-nostem | 245ab 490a 440a | concat | first
title-short | 245a | | first
title-sort | 245 | title_sort | first
title-full | 245 | cat_alpha_subfields | first
title-alt | 130 222 243 245 246 730 740 | cat_alpha_subfields
title-alt | 240a 247a 505t 700klmnopqrst 710t 711t 780t 785t | concat
series-title | 800at 810at 811at 830at 490a 440a | concat | first
uniform-title | 130 240 243 730 | cat_alpha_subfields | first

note | 500a 501a 502abcdgo 504a 505art 506af 508a 511a 518adop 520ab 521a 530bcd3 533abcdefn 534at 536abcdefgh 538a 545a 550a 586a 753abc | concat

subject-exact | 600at 610at 611at 630at 648a 650a 651a 652a 653a 654a 655a 656a 657a 690a 691a | concat
subject | 6.. | cat_alpha_subfields
topic | 650a
geo | 651a
era | 648a
genre | 655a

publisher | 260b 264b
publoc | 260a 257a 264a
pubyear | 008[7-10] 260c | clean_year | first

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url | 856u

format | record | | emit_format
content | record | emit_content
audience | record | emit_audience
language | 008[35-37] | map_language
ln | 008[35-37] 041abdhjkmn 377a

itemtype | 952y | | unique
collection | 9528 | | unique
location | 952c | | unique
barcode | 952p

isbn | 020a 020z | | emit_isbn
isbn-a | 020a | | emit_isbn
issn | 022a 022y 022z 440x 490x 730x 776x 780x 785x
callnumber | 952o
callnumber | 099ab 090ab 050ab 082ab | concat
callnumber-a | 099a 090a 050a 082a

lccn | 010a 010z
ctrlnum | 035a 001[0-15] | trim
record-origin | 999 | extract_org
origin-system-id | 999f
text | 999f | just_numeric | first

cn-sort -- some catalogs seem to have no cn_sort at bib level, so fall back on first item cn.
cn-sort | 9426 9526 | | first

instrumentation | 048 | cat_alpha_subfields

geo-bbox | 999c | emit_bbox
geo-shape | 999c | emit_shape
fulltext | 856b | emit_fulltext
uuid | record | emit_uuids
eformat | 856q

suppress | 942n | | dne_to_zero
could use filter here like 'coerce_int'

koha-tag | 999c | emit_tags

linked_rcn | record | emit_linked_rcns

popularity | 999c | emit_totalissues

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catdate | 999c | emit_datecreated

acqdate | 952d | most_recent

on-shelf-at | 952 | on_shelf_at | unique
owned-by | 952a | | unique
lost | 9521 | | min_or_zero
record must have at least one item with lost value < 1, or no items at all.

on_order_count | 942t
in_process_count | 942u

rating | 999c | emit_rating

create-date | 260c | first emit_best_effort_timestamp | first
load-date | 856x | just_date emit_best_effort_timestamp

pubnum | 028a
geoarea | 043b
prodcountry | 044a
geoclassarea | 052a
geoclasssubarea | 052b
subject-code | 072a
corpname | 110a 710a 260b
corpnumber | 110n 710n
short-title | 210a
map-series | 246 | emit_map_series
edition | 250a
content-classification | 355 | emit_content_class
content-releasability | 999c | emit_content_release
metadata-classification | 355 | emit_md_class
metadata-releasability | 999c | emit_md_release
releasability-normalized | 599c
downgrade-date | 355g | emit_best_effort_timestamp
acquisition-source | 541ac
language-note | 546a
action-id | 583b
action-datetime | 583c | emit_best_effort_timestamp
catsource | 942x
local-collection | 793a
title-version | 830v
guide-site | 952S 856h
guide | record | emit_guides
modified-datetime | 999c | emit_modified_timestamp

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Appendix 2: Search Tips

See http://lucene.apache.org/core/2_9_4/queryparsersyntax.html for detailed search tips. Here are some extracts and examples.

Phrases

Entering multiple words or putting parentheses around multiple worded terms will search the words in any order. To search a term as an exact phrase, enclose it in quotation marks. For example, searching

United States

(United States)

without quotation marks will find records with the word United and the word States (in any order), but will not limit the search to only those records with the two adjacent. For that, search as

"United States"

Searching Against Indexes

You can search against multiple indexes by specifying the index name followed by a colon and the term. For example:

author:"Mark Twain" and title:"Huckleberry Finn"

See Appendix 1 for a list of Solr index names.

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Wildcard Searching

You can do single and multiple character wildcard searches within single terms (not within phrase queries). For single character wildcards, use a ? symbol. For multiple characters, use an *. For example:

te?t will find “test” and “tent” but not “tests” or “tents”

te*t will find “test” and “tent” and “tenet” (among others)

You cannot use the ? or * as the first character of a search.

Fuzzy Searching

Fuzzy searching looks for similar words, based on an internal algorithm. Use the tilde (~) at the end of a single word search, and it will try to find terms that are spelled similarly. For example, searching

mark~

finds not only “mark” and “mark” but also things like “cork” and “mart” and “marx” (and many other variants).

Proximity Searching

You can look for words within a specified distance of each other. For example, searching

"pilot Mississippi"~10

will find records with the “pilot” and “Mississippi” within 10 words of each other somewhere in the record.

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Boolean Searching

The Boolean operators AND, "+", OR, NOT and "-" are available. Note that the operators must be entered in all caps. OR is the default – if you enter a multiple word term like United States without the surrounding quotes, it will look for all records with either United or States. You can construct a Boolean search like this:

> “United States” AND government

> “United States” NOT government

You can also group search terms with parentheses:

> (“United States” AND government) NOT Congress

More elaborate queries and additional operators are available; see the above web site for examples and information.

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